

PHA Plans

Annual Plan for Fiscal Year 2008

FINAL JUNE 2008

Lowell Housing Authority, Massachusetts

PHA Name: Lowell Housing Authority

PHA Number: MA 001

PHA Fiscal Year Beginning: 10/2008

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)

- ☒ Main administrative office of the PHA
- ☒ PHA development management offices
- ☐ PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☒ Public library
- ☒ PHA website
- ☐ Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- ☒ Main business office of the PHA
- ☐ PHA development management offices
- ☐ Other (list below)

Annual PHA Plan
PHA Fiscal Year 2008
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

☒ **Standard Plan**

Streamlined Plan:

- ☐ **High Performing PHA**
- ☐ **Small Agency (<250 Public Housing Units)**
- ☐ **Administering Section 8 Only**

☐ **Troubled Agency Plan**

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

The Lowell Housing Authority will strive to exceed the level of service provided to our residents in our last fiscal year. We are most proud of our High Performer rating in PHAS and SEMAP and will work this year to meet this level of success. Our staff will continue to be trained in various areas, especially during this first year of implementation utilizing the Project Based Accounting format. We will monitor our progress each month to ensure that our Agency is meeting budgetary goals established for the fiscal year.

In February 2008, we began the process of securing funding through the Modernization Express Loan Program to complete rehabilitation of units at the North Common Village Development. This development was constructed in 1937 and is in need of overall upgrades to electrical and plumbing systems and installation of new kitchens and baths. In addition, all new heating equipment is currently being installed at this location. It is our hope to complete rehabilitation on all units in our walk-up buildings within the next four years. We are also looking at combining one bedroom units, situated on the third floors of these buildings, into two bedroom apartments. This will allow us to serve additional families from our waiting list and eliminate one bedroom units on higher floors that elders and the disabled have difficulty accessing.

Surveillance cameras at the North Common Village and George Flanagan Development have proved extremely useful. The information obtained from these cameras at our developments has been very effective in solving crimes and identifying visitors and unwanted guests. In the upcoming year we plan to install cameras at the Francis Gatehouse Development and the Bishop Markham Village Development. These

installations are in process and should be completed by year end and will increase security in and around each of these developments.

In 2007, the Administrative Plans for Low Rent Public Housing Program and the Section 8 Program were revised. In 2008, an updated Transfer Policy has been implemented. These documents will provide the framework of our daily operation as we move forward into our next fiscal year.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

Required Attachments:

☒ A. Admissions Policy for Deconcentration

- ☒ B. Assessment of Site Based Waiting List Demographics
- ☒ C. FY 2004-2007 Capital Fund Program Annual & Replacement Housing Fund Statement
- ☒ D. FY 2008 Capital Fund Program Annual & Replacement Housing Fund Statement
- ☒ E. Most Recent Board-approved Operating Budget

Optional Attachments:

- ☒ F. Capital Fund Program 5 Year Action Plan
- ☒ G. LHA Staffing and Org Chart
- ☒ H. RAB Membership List
- ☒ Other (List below, providing each attachment name)
 - ☒ I. Comments of Resident Advisory Board or Boards
 - ☒ J. Progress Report (Year 3 [2007-2008] of 5 Year [2005-2009])
 - ☒ K. ACOP and Administrative Plan Amendments
 - ☒ L. C certifications

Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

| List of Supporting Documents Available for Review | | |
|---|---|---|
| Applicable & On Display | Supporting Document | Applicable Plan Component |
| √ | PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations | 5 Year and Annual Plans |
| √ | State/Local Government Certification of Consistency with the Consolidated Plan | 5 Year and Annual Plans |
| √ | Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement. | 5 Year and Annual Plans |
| √ | Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction | Annual Plan: Housing Needs |
| √ | Most recent board-approved operating budget for the public housing program | Annual Plan: Financial Resources and Attachment E |
| √ | Public Housing Administrative Plan | Annual Plan: Eligibility, |

| List of Supporting Documents Available for Review | | |
|---|---|---|
| Applicable & On Display | Supporting Document | Applicable Plan Component |
| | | Selection, and Admissions Policies |
| √ | Section 8 Administrative Plan | Annual Plan: Eligibility, Selection, and Admissions Policies |
| √ | Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis | Annual Plan: Eligibility, Selection, and Admissions Policies and Attachment A |
| √ | Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy | Annual Plan: Rent Determination |
| √ | Schedule of ceiling rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy | Annual Plan: Rent Determination |
| √ | Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan | Annual Plan: Rent Determination |
| √ | Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation) | Annual Plan: Operations and Maintenance |
| √ | Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy | Annual Plan: Grievance Procedures |
| √ | Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan | Annual Plan: Grievance Procedures |
| √ | The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year | Annual Plan: Capital Needs And Attachments C and D |
| N/A | Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant | Annual Plan: Capital Needs |
| √ | Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option) | Annual Plan: Capital Needs and Attachment F |
| N/A | Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing | Annual Plan: Capital Needs |
| √ | Approved or submitted applications for demolition and/or disposition of public housing | Annual Plan: Demolition and Disposition |

| List of Supporting Documents Available for Review | | |
|---|---|---|
| Applicable & On Display | Supporting Document | Applicable Plan Component |
| √ | Approved or submitted applications for designation of public housing (Designated Housing Plans) | Annual Plan: Designation of Public Housing |
| √ | Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act | Annual Plan: Conversion of Public Housing |
| √ | Approved or submitted public housing homeownership programs/plans | Annual Plan: Homeownership |
| √ | Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan | Annual Plan: Homeownership |
| √ | Any cooperative agreement between the PHA and the TANF agency | Annual Plan: Community Service & Self-Sufficiency |
| √ | FSS Action Plan/s for public housing and/or Section 8 | Annual Plan: Community Service & Self-Sufficiency |
| √ | Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports | Annual Plan: Community Service & Self-Sufficiency |
| N/A | The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan) | Annual Plan: Safety and Crime Prevention |
| √ | The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings | Annual Plan: Annual Audit |
| N/A | Troubled PHAs: MOA/Recovery Plan | Troubled PHAs |
| | Other supporting documents (optional) (list individually; use as many lines as necessary) | (specify as needed) |
| | | |

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

| HOUSING NEEDS TABLE | | |
|---------------------|---------|---------|
| Household Type | % of HH | # of HH |
| | | |

| HOUSING NEEDS TABLE | | | | | | |
|------------------------------------|--------|-------------|-------------------|---------|---------|--|
| Household Type | | | | % of HH | # of HH | |
| Household Income <= 30% of MFI | RENTER | Elderly | Total No. of HH | 100.0% | 1,886 | |
| | | | Any Hsg. Problem | 55.7% | 1,051 | |
| | | | Cost Burden > 30% | 54.4% | 1,026 | |
| | | | Cost Burden > 50% | 35.9% | 678 | |
| | | Sm. Related | Total No. of HH | 100.0% | 2,265 | |
| | | | Any Hsg. Problem | 74.0% | 1,675 | |
| | | | Cost Burden > 30% | 70.0% | 1,585 | |
| | | | Cost Burden > 50% | 47.7% | 1,080 | |
| | | Lg. Related | Total No. of HH | 100.0% | 865 | |
| | | | Any Hsg. Problem | 90.2% | 780 | |
| | | | Cost Burden > 30% | 78.6% | 680 | |
| | | | Cost Burden > 50% | 48.0% | 415 | |
| | | Other | Total No. of HH | 100.0% | 2,084 | |
| | | | Any Hsg. Problem | 67.4% | 1,404 | |
| | | | Cost Burden > 30% | 64.7% | 1,349 | |
| | | | Cost Burden > 50% | 48.9% | 1,020 | |
| | OWNER | Elderly | Total No. of HH | 100.0% | 828 | |
| | | | Any Hsg. Problem | 78.4% | 649 | |
| | | | Cost Burden > 30% | 78.4% | 649 | |
| | | | Cost Burden > 50% | 55.0% | 455 | |
| | | Sm. Related | Total No. of HH | 100.0% | 310 | |
| | | | Any Hsg. Problem | 90.3% | 280 | |
| | | | Cost Burden > 30% | 90.3% | 280 | |
| | | | Cost Burden > 50% | 72.6% | 225 | |
| | | Lg. Related | Total No. of HH | 100.0% | 59 | |
| | | | Any Hsg. Problem | 93.2% | 55 | |
| | | | Cost Burden > 30% | 86.4% | 51 | |
| | | | Cost Burden > 50% | 72.9% | 43 | |
| | | Other | Total No. of HH | 100.0% | 175 | |
| | | | Any Hsg. Problem | 80.0% | 140 | |
| | | | Cost Burden > 30% | 80.0% | 140 | |
| | | | Cost Burden > 50% | 68.6% | 120 | |
| Household Income >30% <=50% of MFI | RENTER | Elderly | Total No. of HH | 100.0% | 632 | |
| | | | Any Hsg. Problem | 50.2% | 317 | |
| | | | Cost Burden > 30% | 49.5% | 313 | |
| | | | Cost Burden > 50% | 7.8% | 49 | |
| | | Sm. Related | Total No. of HH | 100.0% | 1,460 | |
| | | | Any Hsg. Problem | 61.0% | 890 | |
| | | | Cost Burden > 30% | 52.7% | 770 | |
| | | | | | | |

| HOUSING NEEDS TABLE | | | | | |
|-------------------------------------|--------|-------------|-------------------|---------|---------|
| Household Type | | | | % of HH | # of HH |
| | OWNER | Lg. Related | Cost Burden > 50% | 5.1% | 75 |
| | | | Total No. of HH | 100.0% | 659 |
| | | | Any Hsg. Problem | 72.7% | 479 |
| | | | Cost Burden > 30% | 31.0% | 204 |
| | | | Cost Burden > 50% | 1.5% | 10 |
| | | Other | Total No. of HH | 100.0% | 1,105 |
| | | | Any Hsg. Problem | 73.8% | 815 |
| | | | Cost Burden > 30% | 68.8% | 760 |
| | | | Cost Burden > 50% | 17.2% | 190 |
| | | Elderly | Total No. of HH | 100.0% | 884 |
| | | | Any Hsg. Problem | 19.1% | 169 |
| | | | Cost Burden > 30% | 18.7% | 165 |
| | | | Cost Burden > 50% | 11.3% | 100 |
| | | Sm. Related | Total No. of HH | 100.0% | 447 |
| | | | Any Hsg. Problem | 74.3% | 332 |
| | | | Cost Burden > 30% | 73.4% | 328 |
| | | | Cost Burden > 50% | 33.3% | 149 |
| | | Lg. Related | Total No. of HH | 100.0% | 163 |
| | | | Any Hsg. Problem | 75.5% | 123 |
| | | | Cost Burden > 30% | 73.0% | 119 |
| | | | Cost Burden > 50% | 11.7% | 19 |
| | | Other | Total No. of HH | 100.0% | 243 |
| | | | Any Hsg. Problem | 71.2% | 173 |
| | | | Cost Burden > 30% | 71.2% | 173 |
| | | | Cost Burden > 50% | 46.5% | 113 |
| Household Income >50% <= 80% of MFI | RENTER | Elderly | Total No. of HH | 100.0% | 318 |
| | | | Any Hsg. Problem | 13.5% | 43 |
| | | | Cost Burden > 30% | 13.5% | 43 |
| | | | Cost Burden > 50% | 0.0% | 0 |
| | | Sm. Related | Total No. of HH | 100.0% | 1,663 |
| | | | Any Hsg. Problem | 17.0% | 283 |
| | | | Cost Burden > 30% | 10.7% | 178 |
| | | | Cost Burden > 50% | 0.6% | 10 |
| | | Lg. Related | Total No. of HH | 100.0% | 580 |
| | | | Any Hsg. Problem | 62.9% | 365 |
| | | | Cost Burden > 30% | 4.3% | 25 |
| | | | Cost Burden > 50% | 0.0% | 0 |
| | | Other | Total No. of HH | 100.0% | 1,554 |
| | | | Any Hsg. Problem | 21.5% | 334 |

| HOUSING NEEDS TABLE | | | | | |
|---------------------|-------|-------------|-------------------|---------|---------|
| Household Type | | | | % of HH | # of HH |
| | | | Cost Burden > 30% | 18.0% | 280 |
| | | | Cost Burden > 50% | 0.6% | 10 |
| | OWNER | Elderly | Total No. of HH | 100.0% | 862 |
| | | | Any Hsg. Problem | 17.6% | 152 |
| | | | Cost Burden > 30% | 15.9% | 137 |
| | | | Cost Burden > 50% | 3.9% | 34 |
| | | Sm. Related | Total No. of HH | 100.0% | 938 |
| | | | Any Hsg. Problem | 46.7% | 438 |
| | | | Cost Burden > 30% | 46.3% | 434 |
| | | | Cost Burden > 50% | 9.6% | 90 |
| | | Lg. Related | Total No. of HH | 100.0% | 560 |
| | | | Any Hsg. Problem | 53.6% | 300 |
| | | | Cost Burden > 30% | 40.2% | 225 |
| | | | Cost Burden > 50% | 1.8% | 10 |
| | | Other | Total No. of HH | 100.0% | 435 |
| | | | Any Hsg. Problem | 60.9% | 265 |
| | | | Cost Burden > 30% | 60.9% | 265 |
| | | | Cost Burden > 50% | 8.0% | 35 |

| Median Family Income | Total Households | Households with Any Housing Problem | % with Any Housing Problems | Disproportionate Need Threshold |
|--------------------------------------|------------------|-------------------------------------|-----------------------------|---------------------------------|
| < 30% MFI | 8,472 | 6,032 | 71.20% | 81.20% |
| 31 - 50% MFI | 5,593 | 3,300 | 59.00% | 69.00% |
| 51 - 80% MFI | 6,910 | 2,177 | 31.50% | 41.50% |
| > 81% MFI | 16,861 | 1,821 | 10.80% | 20.80% |
| BLACK NON-HISPANIC HOUSEHOLDS | | | | |
| < 30% MFI | 228 | 148 | 64.90% | No |
| 31 - 50% MFI | 205 | 135 | 65.90% | No |
| 51 - 80% MFI | 258 | 95 | 36.80% | No |
| > 81% MFI | 487 | 78 | 16.00% | No |
| ASIAN NON-HISPANIC HOUSEHOLDS | | | | |
| < 30% MFI | 940 | 740 | 78.70% | No |
| 31 - 50% MFI | 580 | 440 | 75.90% | Yes |
| 51 - 80% MFI | 800 | 365 | 45.60% | Yes |
| > 81% MFI | 1,855 | 501 | 27.00% | Yes |
| HISPANIC HOUSEHOLDS | | | | |
| < 30% MFI | 1,694 | 1,215 | 71.70% | No |
| 31 - 50% MFI | 864 | 530 | 61.30% | No |

| Median Family Income | Total Households | Households with Any Housing Problem | % with Any Housing Problems | Disproportionate Need Threshold |
|----------------------|------------------|-------------------------------------|-----------------------------|---------------------------------|
| 51 - 80% MFI | 789 | 299 | 37.90% | No |
| > 81% MFI | 959 | 185 | 19.30% | No |

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- ☒ Consolidated Plan of the Jurisdiction/s
Indicate year: 2008
- ☒ U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset Indicate year: 2000
- ☐ American Housing Survey data
Indicate year:
- ☐ Other housing market study
Indicate year:
- ☐ Other sources: (list and indicate year of information)

B. Housing Needs of Families on the Public Housing and Section 8 Tenant- Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

| FEDERAL | | | |
|--|---------------|---------------------|-----------------|
| Housing Needs of Families on the Waiting List | | | |
| Waiting list type: (select one) | | | |
| <input type="checkbox"/> HCV [Section 8] Tenant-based assistance <input checked="" type="checkbox"/> Federal Public Housing (Rolled up Site Based Lists) <input type="checkbox"/> Combined Section 8 and Public Housing <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 5436 | | |
| Extremely low income ≤30% AMI | 4852 | 89% | |
| Very low income | 491 | 9% | |

| FEDERAL | | | |
|--|---|------|--|
| Housing Needs of Families on the Waiting List | | | |
| Waiting list type: (select one) | | | |
| <input type="checkbox"/> | HCV [Section 8] Tenant-based assistance | | |
| <input checked="" type="checkbox"/> | Federal Public Housing (Rolled up Site Based Lists) | | |
| <input type="checkbox"/> | Combined Section 8 and Public Housing | | |
| <input type="checkbox"/> | Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | |
| If used, identify which development/subjurisdiction: | | | |
| (>30% but <=50% AMI) | | | |
| Low income (>50% but <80% AMI) | 93 | 2% | |
| Disabled Elderly | 384 | 7% | |
| Non Disabled Elderly | 378 | 7% | |
| Non-Elderly Families with Other Disabilities | 1773 | 33% | |
| Other Families w/Adult | 498 | 9% | |
| Families with Children | 1980 | 36% | |
| Single | 123 | 2% | |
| Non-Elderly Families with Physical Disabilities | 0 | 0% | |
| White | 1870 | 34% | |
| Black | 264 | 5% | |
| Hispanic | 2591 | 48% | |
| Asian | 696 | 13% | |
| American Indian | 8 | 0% | |
| Nat Hawaiian/Pacific | 264 | 5% | |
| 0BR | 143 | 3% | |
| 1BR | 2660 | 50% | |
| 2 BR | 2299 | 87% | |
| 3 BR | 275 | 82% | |
| 4 BR | 40 | 68% | |
| 5 BR | 19 | 100% | |
| 5+ BR | 0 | 0% | |

| |
|---|
| Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Only for 3 & 4 BR Units |
| If yes: |
| How long has it been closed (# of months)? 80 months (only for 3 & 4 BRs) |
| Does the PHA expect to reopen the 3 & 4 BR list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes |
| Does the PHA permit specific categories of families onto the waiting list, even if |

generally closed? ☐ No ☒ Yes in case of disasters

| FEDERAL | | | |
|--|---------------|---------------------|-----------------|
| Housing Needs of Families on the Waiting List | | | |
| Waiting list type: (select one) | | | |
| <input checked="" type="checkbox"/> HCV [Section 8] Tenant-based assistance | | | |
| <input type="checkbox"/> Federal Public Housing | | | |
| <input type="checkbox"/> Combined Section 8 and Public Housing | | | |
| <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 332 | | 3% |
| Extremely low income <=30% AMI | 308 | 92% | |
| Very low income (>30% but <=50% AMI) | 22 | 6% | |
| Low income (>50% but <80% AMI) | 2 | 0% | |
| Families with children | 236 | 71% | |
| Elderly families | 12 | 3% | |
| Families with disabilities | 96 | 28% | |
| White | 125 | 37% | |
| African-American | 39 | 11% | |
| Hispanic | 145 | 43% | |
| American Indian | 2 | 0% | |
| Asian | 21 | 6% | |
| 0BR | | 0 | |
| 1BR | | 332 | |
| 2 BR | | 562 | |
| 3 BR | | 346 | |
| 4 BR | | 58 | |
| 5 BR | | 4 | |
| 5+ BR | | 3 | |
| Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes | | | |
| If yes: | | | |

| FEDERAL | |
|---|---|
| Housing Needs of Families on the Waiting List | |
| Waiting list type: (select one) | |
| <input checked="" type="checkbox"/> | HCV [Section 8] Tenant-based assistance |
| <input type="checkbox"/> | Federal Public Housing |
| <input type="checkbox"/> | Combined Section 8 and Public Housing |
| <input type="checkbox"/> | Public Housing Site-Based or sub-jurisdictional waiting list (optional) |
| If used, identify which development/subjurisdiction: | |
| How long has it been closed (# of months)? 25 months | |
| Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | |
| Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes in case of disasters | |

| FEDERAL | | | |
|--|---|---------------------|-----------------|
| Housing Needs of Families on the Waiting List | | | |
| Waiting list type: (select one) | | | |
| <input checked="" type="checkbox"/> | HCV [Section 8] Project-based assistance | | |
| <input type="checkbox"/> | Federal Public Housing | | |
| <input type="checkbox"/> | Combined Section 8 and Public Housing | | |
| <input type="checkbox"/> | Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 1305 | | |
| Extremely low income <=30% AMI | 1108 | 85% | |
| Very low income (>30% but <=50% AMI) | 184 | 0% | |
| | | 14% | |
| Low income (>50% but <80% AMI) | 13 | 0% | |
| | | 1% | |
| Disabled Elderly | 56 | 4% | |
| Non Disabled Elderly | 40 | 3% | |
| Non-Elderly Families with Other Disabilities | 307 | 24% | |
| Other Famnilies w/Adult | 57 | 4% | |

| FEDERAL | | | |
|--|-----|-----|--|
| Housing Needs of Families on the Waiting List | | | |
| Waiting list type: (select one) <input checked="" type="checkbox"/> HCV [Section 8] Project-based assistance <input type="checkbox"/> Federal Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction: | | | |
| Families with Children | 710 | 54% | |
| Single | 105 | 8% | |
| Non-Elderly Families with Physical Disabilities | 0 | 0% | |
| White | 377 | 29% | |
| Black | 102 | 8% | |
| Hispanic | 657 | 50% | |
| Asian | 164 | 13% | |
| American Indian | 4 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | 0 | | |
| 1BR | 332 | | |
| 2 BR | 562 | | |
| 3 BR | 346 | | |
| 4 BR | 58 | | |
| 5 BR 4 | | | |
| 5+ BR 3 | | | |
| Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes If yes: How long has it been closed (# of months)? 43 months Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes in case of disasters | | | |

| FEDERAL | |
|--|--|
| Housing Needs of Families on the Waiting List | |
| | |

| | | | |
|--|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| <input checked="" type="checkbox"/> HCV [Section 8] Lottery-based assistance | | | |
| <input type="checkbox"/> Federal Public Housing | | | |
| <input type="checkbox"/> Combined Section 8 and Public Housing | | | |
| <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 2546 | | |
| Extremely low income <=30% AMI | 2196 | 86% | |
| Very low income (>30% but <=50% AMI) | 286 | 0% | |
| | | 11% | |
| Low income (>50% but <80% AMI) | 64 | 0% | |
| | | 3% | |
| Disabled Elderly | 66 | 3% | |
| Non Disabled Elderly | 34 | 1% | |
| Non-Elderly Families with Other Disabilities | 566 | 22% | |
| Other Families w/Adult | 219 | 9% | |
| Families with Children | 1386 | 54% | |
| Single | 275 | 11% | |
| Non-Elderly Families with Physical Disabilities | 0 | 0% | |
| White | 1071 | 42% | |
| Black | 388 | 15% | |
| Hispanic | 973 | 38% | |
| Asian | 104 | 4% | |
| American Indian | 7 | 0% | |
| Nat Hawaiian/Pacific | 3 | 0% | |
| 0BR | | 0 | |
| 1BR | | 842 | |
| 2 BR | | 1026 | |
| 3 BR | | 543 | |
| 4 BR | | 119 | |
| 5 BR | | 12 | |
| 5+ BR 4 | | | |
| Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes | | | |
| If yes: | | | |
| How long has it been closed (# of months)? 34 months | | | |

| FEDERAL | | | |
|--|---|---------------------|-----------------|
| Housing Needs of Families on the Waiting List | | | |
| Waiting list type: (select one) | | | |
| <input checked="" type="checkbox"/> | HCV [Section 8] Lottery-based assistance | | |
| <input type="checkbox"/> | Federal Public Housing | | |
| <input type="checkbox"/> | Combined Section 8 and Public Housing | | |
| <input type="checkbox"/> | Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | |
| Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | |

C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

The following are the strategies prioritized in the 5 Year Plan Goals for Year 4 [October 2008-September 2009].

| Changes Facing the Agency | Priority | Year to be Addressed |
|---|----------|----------------------|
| More training for all employees, especially in the maintenance trades | High | 3-5 |
| Rotate staff periodically to different jobs and locations | Low | 3-5 |
| Staff need a lot more training including communication, demeanor and management of relationships with other staff | Low | 3-5 |
| Reduced resources requires a different approach to staff utilization, discipline and leadership | Low | 3-5 |

| Increase the availability of decent, safe, and affordable housing - preservation. | Priority | Year to be Addressed |
|---|----------|----------------------|
| More police on every site | High | 3-5 |
| More surveillance cameras | High | 3-5 |

| Increase the availability of decent, safe, and affordable housing – production. | Priority | Year to be Addressed |
|---|-----------------|-----------------------------|
| Increase home ownership opportunities | High | 3-5 |
| Develop Project Based and other housing for mentally ill (400 people under 65 yrs old and 100 over 65 yrs old in LHA in 2005) and connect with services | High | 3-5 |

| Improve community quality of life and economic vitality | Priority | Year to be Addressed |
|--|-----------------|-----------------------------|
| Continue the increase in the number of employed residents in public housing and HCV program (2003 – 14%, 2004 – 19%, 2005 – 20%, 2006-34%) | High | 3-5 |
| More Section 8 vouchers for working HHs | Low | 3-5 |

| Promote self-sufficiency and asset development of families and individuals | Priority | Year to be Addressed |
|---|-----------------|-----------------------------|
| Improve housing stock to make it marketable to higher income HHs | Low | 3-5 |
| Continue unit care and responsibility training for all new tenants | Low | 3-5 |
| Get all residents employed full-time | Medium | 3-5 |
| Implement an IDA Program with CDBG funds | High | 4 |

| Ensure Equal Opportunity in Housing for all Americans | Priority | Year to be Addressed |
|--|-----------------|-----------------------------|
|--|-----------------|-----------------------------|

| Diversify the Operational Base of the Authority | Priority | Year to be Addressed |
|--|-----------------|-----------------------------|
| More care about who become tenants | Low | 3-5 |

| Other Goals the LHA should pursue | Priority | Year to be Addressed |
|---|-----------------|-----------------------------|
| Make work fun | Low | 3-5 |
| Re-caulk and wash windows annually | Medium | 3-5 |
| Rebuild or replace elevators | High | 3-4 |
| Total Replacement of Heating and Hot Water systems in Nth Common | High | 3-4 |
| Remodel all units cabinets, stoves, sinks etc. in Nth Common, Flanagan, Francis Gatehouse, Bishop Markham | High | 3-4 |

| Other Goals the LHA should pursue | Priority | Year to be Addressed |
|--|-----------------|-----------------------------|
| Redesign or reconfigure Adams Street for improved parking and travel using CDBG Funds | High | 4 |
| Removal of internal gutter systems in hi-rises in Nth Common | High | 3-4 |
| Have property managers and site maintenance staff more involved in rehab and construction work from design to construction | High | 3-5 |
| Need for more productivity through better tools | Low | 3-5 |
| Analyze work orders more usefully such as what are the most common/most expensive 'failures' | Low | 3-5 |
| Reduce favoritism and nepotism in the Authority | Low | 3-5 |
| Staffing has not kept up with demands - understaffing | Low | 3-4 |
| Communication within the agency needs to be upgraded | High | 3-4 |
| How can staff 'burn-out' be managed? | Low | 3-5 |
| Introduce more cross-training | Low | 3-5 |
| Continue privatization of operations wherever possible | Medium | 3-5 |

Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- ☒ Funding constraints
- ☒ Staffing constraints
- ☒ Extent to which particular housing needs are met by other organizations in the community
- ☒ Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- ☒ Influence of the housing market on PHA programs
- ☒ Community priorities regarding housing assistance
- ☒ Results of consultation with local or state government
- ☒ Results of consultation with residents and the Resident Advisory Board
- ☒ Results of consultation with advocacy groups
- ☒ Other: (list below)
 - ☒ Specialized housing studies

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

| Financial Resources: Planned Sources and Uses | | |
|---|-------------------|---------------------|
| Sources | Planned \$ | Planned Uses |
| 1. Federal Grants (FY 2007 grants) | | |
| a) Public Housing Operating Fund | 6,574,908 | |
| A. Public Housing Capital Fund | 3,009,315 | |
| B. HOPE VI Revitalization | 0 | |
| C. HOPE VI Demolition | 0 | |
| D. Annual Contributions for Section 8 Tenant-Based Assistance | 12,800,000 | |
| E. Public Housing Drug Elimination Program (including any Technical Assistance funds) | 0 | |
| a) Resident Opportunity and Self-Sufficiency Grants | 349,809 | |
| b) Community Development Block Grant | 8,000 | |
| c) HOME | 0 | |
| Other Federal Grants (list below) | 0 | |
| FSS Coordinator/Homeownership Grant | 119,180 | |
| 2. Prior Year Federal Grants (unobligated funds only) (list below) | | |
| Capital Fund Program | \$3,009,315 | |
| 3. Public Housing Dwelling Rental Income | | |
| Federal Low Rent Public Housing | 5,820,000 | Operations |
| | | |
| 4. Other income (list below) | | |
| Investment Income(Federal) | 117,000 | Operations |
| Other Income other than rent and interest. | 137,000 | Operations |

| Financial Resources: Planned Sources and Uses | | |
|--|---------------------|---------------------|
| Sources | Planned \$ | Planned Uses |
| 4. Non-federal sources (list below) | | |
| State Low Rent Public Housing including MRVP vouchers | 2,070,000 | |
| Unrestricted Investment Income (State) | 35,000 | |
| | | |
| Total resources | \$34,049,527 | |

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 ©]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

(1) Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

☐ When families are within a certain number of being offered a unit: (state number)

☒ When families are within a certain time of being offered a unit:

No verification, other than mail notification of placement on the waiting list, is made at initial application for waiting lists which are open. Within six months of an applicant likely to receive an offer of a unit, an applicant will be notified in writing to schedule an appointment to commence the final application process including verification.

☐ Other: (describe)

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

☒ Criminal or Drug-related activity

☒ Rental history

☐ Housekeeping

☒ Other (describe)

☒ Verification of preference claims or status

c. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. ☒ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. ☒ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

The agency is in the process of securing authorization to check federal records.

(2) Waiting List Organization

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

- ☐ The LHA will continue to use a community-wide list
- ☒ Sub-jurisdictional lists
- ☐ Other (describe)

b. Where may interested persons apply for admission to public housing?

- ☒ PHA Leasing and Occupancy Office, 285 Salem St. Lowell
- ☒ Each LRPH Site
- ☐ Other (list below)

c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year?

Nine (9).

2. ☐ Yes ☒ No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?

3. ☒ Yes ☐ No: May families be on more than one list simultaneously
If yes, how many lists?

Any and all

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- ☒ PHA Leasing and Occupancy Office, 285 Salem St. Lowell
- ☒ All PHA development management offices
- ☐ Management offices at developments with site-based waiting lists
- ☐ At the development to which they would like to apply
- ☒ Other (list below)
- ☒ The Lowell Housing Authority website

(3) Assignment

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- ☐ One
- ☐ Two
- ☐ Three or More
- ☒ Other:

In all cases the number of offers applies as if there was a single agency wide waiting list, irrespective of how many waiting lists a household is on.
In all cases anyone claiming status priority preferences and refusing the first offer, shall be placed into the non-preference (time and date) location on the waiting list.

- ☒ For family applicants there is one offer only (verified medical exceptions are made).
☒ For elderly applicants there can be three offers made.

b. ☒ Yes ☐ No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

(4) Admissions Preferences

a. Income targeting:

☐ Yes ☒ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

During the period of October 1, 2006 through September 30, 2007, ??% of all LRPH admissions were of families at 30% of median income or below. The remaining ??% admissions of LRPH families were between 31% and 80% of median income.

b. Transfer policies:

In what circumstances will transfers take precedence over new admissions? (list below)

- ☒ Emergencies
☒ Overhoused
☒ Underhoused
☒ Medical justification
☒ Administrative reasons determined by the PHA (e.g., to permit modernization work)
☐ Resident choice: (state circumstances below)
☒ Other: (list below)

☒ The Policy offers four priorities. These include Emergency Transfer, Reasonable Accommodation Transfer, Demolition, Disposition and Rehabilitation Transfer and Occupancy Standard Transfer. All transfers are mandatory with the exception of those offered for Reasonable Accommodations. Emergency Transfers are granted for life threatening medical conditions, domestic violence issues and if a unit

poses an immediate threat to a resident. The Occupancy Standard Transfer will be offered to those residing in units too large or small for their family compositions.

c. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☒ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☒ Working families and those unable to work because of age or disability
- ☒ Veterans and veterans’ families
- ☒ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☒ Households that contribute to meeting income goals (broad range of incomes)
- ☒ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preference(s) (list below)
 - ☒ Involuntarily displaced from a dwelling unit in the municipality of Lowell
 - ☒ Residents required to move because of modernization.

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

All Date and Time within the following ranked priorities –

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans’ families

- ☐ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other Ranked preference(s) (list below)
 - ☒ #1. Involuntarily displaced from a dwelling unit in the municipality of Lowell
 - ☒ #2. Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or person 62 years old or older or a person unable to work because of the extent of their disability
 - ☒ #3. A legal resident of Lowell or a person working in Lowell an average of 20 hours a week or more or a person with a job offer to work in Lowell with a minimum of 20 hours a week of work
 - ☒ #4. A victim of domestic violence as verified by a Court or law enforcement agency.
 - ☒ #5. A veteran as verified by the Department of Veteran Affairs

Note: Each of the preferences carries different weights which are added together for actual preference weighting. The maximum points which can be received is 600.

4. Relationship of preferences to income targeting requirements:

- ☒ The PHA will apply preferences within income tiers utilizing skipping patterns
- ☐ Not applicable

(5) Occupancy

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- ☒ The PHA-resident lease
- ☒ The PHA's Administrative Plan
- ☒ The LHA intends to develop briefing seminars and other visual and written materials for applicants
- ☐ Other source (list)

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- ☒ At an annual reexamination and lease renewal
- ☒ Any time family composition changes
- ☐ At family request for revision
- ☐ Other (list)

(6) Deconcentration and Income Mixing

a. ☒ Yes ☐ No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. ☒ Yes ☐ No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

☒ Adoption of site based waiting lists

Site based waiting lists were adopted in October 2002.

☒ Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments

☐ Employing new admission preferences at targeted developments

If selected, list targeted developments below:

☐ Other (list policies and developments targeted below)

d. ☐ Yes ☒ No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

☐ Additional targeted marketing

☐ Actions to improve the marketability of certain developments

☐ Adoption or adjustment of ceiling rents for certain developments

☐ Adoption of rent incentives to encourage deconcentration of poverty and income-mixing at targeted developments

☐ Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)

☒ Not applicable: results of analysis did not indicate a need for such efforts

☐ List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

☐ Not applicable: results of analysis did not indicate a need for such efforts

☒ List (any applicable) developments below:

MA 1-2, 1-7, 1-12, 1-14 will be targeted for admission of lower income families, utilizing the strategies outlined above.

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B.

Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- ☒ Criminal or drug-related activity only to the extent required by law or regulation
 - ☒ Criminal and drug-related activity, more extensively than required by law or regulation
 - ☒ More general screening than criminal and drug-related activity (list factors below)
 - ☒ Other (list below)
 - ☐ Rental history
 - ☒ Verification of preference claims or status
- b. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. ☒ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. ☒ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

The agency is in the process of securing authorization to check federal records.

- e. Indicate what kinds of information you share with prospective landlords (select all that apply).
- ☐ Criminal or drug-related activity
 - ☒ Other (describe below)
 - ☒ Tenant's Current Address
 - ☒ Name and Address of the Current Landlord
 - ☒ Name and Address of the Tenant's prior Landlord

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- ☒ None
 - ☐ Federal public housing
 - ☐ Federal moderate rehabilitation
 - ☐ Federal project-based certificate program

☐ Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

☐ PHA main administrative office

☒ Other (list below)

☒ Leasing & Occupancy Administrative Office

(3) Search Time

a. ☒ Yes ☐ No: Does the PHA give extensions on standard 60-day period to search for a unit?

Extensions take into account whether the family has made due diligence in finding a unit, whether there are medical or other circumstances which have affected the family's ability to find a unit, a reasonable expectation that an extension will result in success, and whether a family has requested an extension previously.

(4) Admissions Preferences

a. Income targeting

☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

During the period of October 1, 2005 through September 30, 2006, 75% of the total number of vouchers issued were to families at or below 30% of median income. The remaining 25% were issued to families at 50% of median income or below.

b. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)

☒ Victims of domestic violence

☐ Substandard housing

☐ Homelessness

☐ High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

☒ Working families and those unable to work because of age or disability

- ☒ Veterans and veterans' families
- ☒ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☒ Households that contribute to meeting income goals (broad range of incomes)
- ☒ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

All Date and Time plus the following ranked priorities

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preference(s) (list below)
 - ☒ #1. Involuntarily displaced from a dwelling unit in the municipality of Lowell
 - ☒ #2. Households which reside within the City of Lowell and participate in a non-Federal subsidy program whom are at risk of displacement due to changes in the affordability requirements, administrative delivery system or level of subsidy available for specific programs.
 - ☒ #3. Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or person 62 years old or older or a person unable to work because of the extent of their disability
 - ☒ #4. A legal resident of Lowell or a person working in Lowell an average of 20 hours a week or more or a person with a job offer to work in Lowell with a minimum of 20 hours a week of work
 - ☒ #5. A victim of domestic violence as verified by a Court or law enforcement agency.
 - ☒ #6. A veteran as verified by the Department of Veteran Affairs

Note: Each of the preferences carries different weights which are added together for actual preference weighting. The total number of points which can be earned is 600.

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)

- ☒ Date and time of application
- ☒ Drawing (lottery) or other random choice technique when the wait list is opened for two weeks or less

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)

- ☐ This preference has previously been reviewed and approved by HUD
- ☒ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)

- ☒ The PHA applies preferences within income tiers
- ☐ Not applicable:

(5) Special Purpose Section 8 Assistance Programs

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)

- ☒ The Section 8 Administrative Plan
- ☒ Briefing sessions and written materials
- ☐ Other (list below)

b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?

- ☒ Through published notices
- ☐ Other (list below)

(6) Project Based Section 8 Assistance Programs

The total number of units under contract for Project Based Rental Assistance is 63. These units consist of SRO, two and three bedrooms. In early 2006, we implemented a contract for 12 SRO units for disabled individuals at 205 Middlesex Street in Lowell. These apartments have been completely renovated and a wide array of services will be offered at this location. These services include an on-site nursing staff, a full-time mental health clinician and three case managers. Moving forward we will increase the number of contracts at the former Julian D. Steele location with the addition of newly constructed three bedroom units and we continue to lease new two bedroom apartments at Redwood Terrace in Lowell.

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

- ☒ The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

- ☐ The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
☐ \$1-\$25
☐ \$26-\$50

Currently it is set at \$50

2. ☐ Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below:

c. Rents set at less than 30% than adjusted income

☐ Yes ☐ No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

4. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- ☐ For the earned income of a previously unemployed household member
☐ For increases in earned income
☐ Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

☐ Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

☐ For household heads

☐ For other family members

☐ For transportation expenses

☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families

☐ Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

☐ Yes for all developments

☐ Yes but only for some developments

☐ No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

☐ For all developments

☐ For all general occupancy developments (not elderly or disabled or elderly only)

☐ For specified general occupancy developments

☐ For certain parts of developments; e.g., the high-rise portion

☐ For certain size units; e.g., larger bedroom sizes

☐ Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

☐ Market comparability study

☐ Fair market rents (FMR)

☐ 95th percentile rents

☐ 75 percent of operating costs

☐ 100 percent of operating costs for general occupancy (family) developments

☐ Operating costs plus debt service

☐ The "rental value" of the unit

☐ Other (list below)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

☐ Never

☐ At family option

☐ Any time the family experiences an income increase

- ☐ Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
- ☐ Other (list below)

If at a subsequent period in time it is discovered that there was as unreported increase in income, there will be a retroactive calculation of the rent.

g. ☐ Yes ☐ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☒ The Section 8 rent reasonableness study of comparable housing
- ☒ Survey of rents listed in local newspaper
- ☐ Survey of similar unassisted units in the neighborhood
- ☒ Other (list/describe below)

The LHA conducted a market study focusing on properties which were similar in type, amenities, location and condition.

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies.

Funds are reserved in the ACC using the payment standard in effect when the LHA's application for a funding increment is approved. There is one payment standard for each fair market rent area within its jurisdiction, based on bedroom size. It is not less than 90% of the published FMRs (when payment standard is adopted) and not more than 110% of the FMR and the community wide accepted rent. The standards in effect as of October 2007 are \$817 (0BR), \$977 (1BR), \$1,256 (2BR), \$1,500 (3BR), \$1,646 (4BR), \$1,893 (5BR). They can be adjusted by Affordability Adjustments which are developed annually. These amounts reflect 102% of the published FMR.

a. What is the PHA's payment standard? (select the category that best describes your standard)

- ☐ At or above 90% but below 100% of FMR
- ☐ 100% of FMR
- ☒ Above 100% but at or below 110% of FMR*

☐ Above 110% of FMR (if HUD approved; describe circumstances below)

* Note that the LHA is exploring lower payment standards if HCV budget cutbacks continue.

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ The PHA has chosen to serve additional families by lowering the payment standard
- ☐ Reflects market or submarket
- ☐ Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- ☒ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☒ Reflects market or submarket
- ☒ To increase housing options for families
- ☐ Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- ☒ Annually
- ☐ Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- ☒ Success rates of assisted families
- ☐ Rent burdens of assisted families
- ☐ Other (list below)

(2) Minimum Rent

a. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
- ☐ \$1-\$25
- ☒ \$26-\$50

It is set at \$50 currently

b. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

Note: Even as a high performer, the LHA is choosing to provide information in this section.

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

- ☒ An organization chart showing the PHA's management structure and organization is attached at Attachment G.
- ☒ A brief description of the management structure and organization of the PHA follows:

As is common in Massachusetts, the Lowell Housing Authority manages both Federal and State funded and regulated housing developments. As much as permitted by regulation, the agency has combined regulations and operating procedures. The major areas in which procedures differ concern modernization programs (there is no formula funding of modernization for state aided developments) and changes issuing from the Quality Housing and Work Responsibility Act of 1998, such as preferences in admission.

The Agency has a five member Board of Commissioners, with one appointed by the Governor and the other four appointed by the city Manager of Lowell with City council concurrence. There is an Executive Department including senior staff of an Executive Director and Executive Administrator. Division Directors and staff of the Leasing & Occupancy Dept. are also included in the Executive Department. There is one other department, the Facilities Management Department . This is headed by a Deputy Director.

B. HUD Programs Under PHA Management

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

| Program Name | Units or Families Served at Year Beginning | Expected Turnover |
|---|---|--------------------------|
| Federal Public Housing | 1,641 | 12% |
| State Public Housing | 231 | N/A |
| Section 8 Vouchers | 1,246 | 3% |
| Section 8 Mod Rehab | 0 | N/A |
| Special Purpose Section 8 Certificates/Vouchers (list individually) | 0 | N/A |
| Mainstream | 75 (included in 1246 above) | 1% |

| Program Name | Units or Families Served at Year Beginning | Expected Turnover |
|---|---|--------------------------|
| Public Housing Drug Elimination Program (PHDEP) | Discontinued N/A | N/A |
| Other Federal Programs | | |
| New Approach Anti-Drug Program | N/A | N/A |
| ROSS Supportive Services Program | 1,422 | N/A |
| CDBG Youth Programs | 80 | N/A |

C. Management and Maintenance Policies

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

Public Housing Maintenance and Management: (list below)

- Low Rent Public Housing Administrative Plan [ACOP]
- Equal Opportunity Housing Plan
- Collective Bargaining Agreement
- Pet Policies
- Grievance Procedure
- Criminal Offender Record Information Policy
- Annual Reexamination Review for Federal Projects
- Model Safety Policy
- Rent Collection Policy
- Investment Policy
- Waterbed Policy
- Air Conditioning Policy
- Fence Policy
- Eviction Procedure
- Fire Damaged Apartment Policy
- Employee Privacy Policy

- Disposition Policy
- Capitalization Policy
- Procurement Policy
- Personnel Policy
- By-Laws of the Authority
- Inventory Control Policy
- Rental and Occupancy Policy
- LEP Policy
- Pest Eradication Policy
- Community Service Policy
- Policy and Procedures for Physical Inspections
- EIV Security Procedures
- VAWA Act Policy

HCV [Section 8] Management: (list below)

- HCV [Section 8] Administrative Plan
- Family Self-Sufficiency Action Plan

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

A. Public Housing

1. ☐ Yes ☒ No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

- ☒ PHA main administrative office
- ☒ PHA development management offices
- ☐ Other (list below)

B. Section 8 Tenant-Based Assistance

1. ☒ Yes ☐ No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- ☒ PHA main administrative office
☐ Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

A. Capital Fund Activities

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

- ☒ The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachments C and D.

-or-

- ☐ The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)

(2) Optional 5-Year Action Plan

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

a. ☒ Yes ☐ No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

- ☒ The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment F

-or-

- ☐ The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

In addition, the LHA intends to apply for Modernization Express approval to fund a major modernization of North Common.

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

- ☐ Yes ☒ No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name:

2. Development (project) number:

3. Status of grant: (select the statement that best describes the current status)

- ☐ Revitalization Plan under development
☐ Revitalization Plan submitted, pending approval
☐ Revitalization Plan approved
☐ Activities pursuant to an approved Revitalization Plan underway

- ☐ Yes ☒ No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?

If yes, list development name/s below:

1-12, 1-14 Scattered Sites

1-3 Bishop Markham

- ☒ Yes ☐ No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?

If yes, list developments or activities below:

Note: The LHA has developed a mixed financing plan for a State-aided public housing development which anticipates use of some Federal resources including relocation resources. It also intends to continue to explore the use of Section 32 and bond financing for the acquisition, development and redevelopment of housing including one or more of its LRPH developments.

- ☐ Yes ☒ No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?

If yes, list developments or activities below:

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. ☒ Yes ☐ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

2. Activity Description

☐ Yes ☒ No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

| Demolition/Disposition Activity Description |
|--|
| 1a. Development name: Bishop Markham Village |
| 1b. Development (project) number: MA1-3 |
| 2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/> |
| 3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/> |
| 4. Date application approved : N/A |
| 5. Number of units affected: 8 |
| 6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development |
| 7. Timeline for activity: a. Actual or projected start date of activity: 2/09 b. Projected end date of activity: 2/10 |

The Bishop Markham Village has eight (8) three (3) bedroom units which are underutilized. The Authority plans to convert these units to one (1) bedroom units to accommodate elderly and/or disabled residents.

9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1. ☒ Yes ☐ No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

☐ Yes ☒ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

| Designation of Public Housing Activity Description |
|---|
| 1a. Development name: Bishop Markham Village |
| 1b. Development (project) number: MA 1-3 |
| 2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input checked="" type="checkbox"/> 75:25 |
| 3. Application status (select one) Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/> |
| 4. Date this designation planned for submission: <u>(8/31/09)</u> |
| 5. If approved, will this designation constitute a (select one) <input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously-approved Designation Plan? |
| 6. Number of units affected: 399 |
| 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development |

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act

1. ☐ Yes ☒ No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. ☐ Yes ☒ No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If "No", skip to component 11B; if "yes", complete one activity description for each applicable program/plan, unless eligible to complete a

streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

1. Activity Description

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

The Lowell Housing Authority will explore the Section 32 program. If the Section 32 program is deemed appropriate for the LHA, it will prepare an application to HUD for approval.

B. Section 8 Tenant Based Assistance

1. ☒ Yes ☐ No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

- ☒ Yes ☐ No: Will the PHA limit the number of families participating in the HCV homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- ☒ 25 or fewer participants
☐ 26 - 50 participants
☐ 51 to 100 participants
☐ more than 100 participants

b. PHA-established eligibility criteria

- ☒ Yes ☐ No: Will the PHA’s program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

These are delineated in the HCV [Section 8] Administrative Plan and may be changed as the program continues.

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

A. PHA Coordination with the Welfare (TANF) Agency

☒ Yes ☐ No: Has the PHA has entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? 11/6/2000

The Lowell Housing Authority has coordinated a cooperative agreement with the Department of Transitional Assistance. We have developed a good working relationship through which we are able to obtain information for income verification, service availability, and client sanctioning actions.

1. Other coordination efforts between the PHA and TANF agency (select all that apply)

- ☒ Client referrals
- ☒ Information sharing regarding mutual clients (for rent determinations and otherwise)
- ☒ Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- ☒ Jointly administer programs
- ☐ Partner to administer a HUD Welfare-to-Work voucher program
- ☐ Joint administration of other demonstration program
- ☒ Other (describe)

The LHA intends to explore additional avenues of cooperation in the coming year.

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- ☒ Public housing rent determination policies
- ☒ Public housing admissions policies

- ☒ Section 8 admissions policies
☐ Preference in admission to Section 8 for certain public housing families
☒ Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
☐ Preference/eligibility for public housing homeownership option participation
☒ Preference/eligibility for section 8 homeownership option participation
☐ Other policies (list below)
☐

b. Economic and Social self-sufficiency programs

- ☒ Yes ☐ No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)

| Services and Program | | | | |
|---|----------------|---|---|--|
| Program Name & Description (including location, if appropriate) | Estimated Size | Allocation Method (waiting list/random selection/specific criteria/other) | Access (development office / PHA main office / other provider name) | Eligibility (public housing or section 8 participants or both) |
| Middlesex Community College (Degree and Certificate Programs) | 10 | Specific Criteria | MCC | FSS/PH |
| University of MA at Lowell (Degree Programs) | | As needed | Off site | FSS/PH |
| Lowell Adult Education (ESL and GED Programs) | | As needed | Off Site | FS/PH |
| Earned Income Tax Credit Program | | February 5– April 15th | Casey Family Services CTI, WIC, LCOA | FSS/PH Low Income Residents of The City. |
| Middlesex Community College Links Program | | Spring & Fall | MCC Bedford Campus | FSS/PH |
| Resume Development & Employment Programs | | Ongoing | FSS Department | FSS/PH |
| SuitAbility | | As needed | Off site | FSSPH |
| MCC Work Readiness | 20 | Specific | MCC | FSS/PH/THP |

| Services and Program | | | | |
|--|-----------------------|--|--|---|
| Program Name & Description (including location, if appropriate) | Estimated Size | Allocation Method (waiting list/random selection/specific criteria/other) | Access (development office / PHA main office / other provider name) | Eligibility (public housing or section 8 participants or both) |
| Certification Program | | Criteria | | |
| “Freedom Through Finance” Skills Course | 7 | February & March | LHA Lowell Five MCC | THP |
| Informational Employment Opportunities (FSS Staff) | 35 | Voluntary Ongoing | FSS Department | FSS |
| Credit Counseling and Credit Repair (FSS Staff) | 35 | Voluntary Ongoing | FSS Department | FSS |
| Homeownership Opportunities & Applications (FSS Staff) | Ongoing | Voluntary Ongoing | FSS Department | FSS/PH/S8 |
| First Time Homebuyer Programs (Merrimack Valley Housing Partnership) | 35 | Voluntary Ongoing | Off Site | FSS/PH |
| Homebuyer Assistance (RFDC) | 35 | Voluntary | FSS Department | FSS/PH |
| Voter Registration | 100 | Ongoing | FSS Dept. | PH & S8 |
| SHIFT | 15 | Monthly | Community Teamwork Inc. | PH/S8/THP |
| Lowell Housing Authority’s Transitional Housing Program | 12 | Ongoing | LHA | DTA Shelter Referrals |
| FSS Coordinating Committee Provider Network | 15 | Quarterly | FSS Dept. | PH/S8/THP |
| Public Housing Resident Counsel FSS Seminars | | As needed - ongoing | Resident Council Community Rooms | PH |
| Driver’s Education Program Spanish and English | 15 | As needed | Casey Family, LHA & Safety First Driving School | PH/S8/THP |

| Services and Program | | | | |
|---|----------------|---|---|--|
| Program Name & Description (including location, if appropriate) | Estimated Size | Allocation Method (waiting list/random selection/specific criteria/other) | Access (development office / PHA main office / other provider name) | Eligibility (public housing or section 8 participants or both) |
| Boy's & Girl's Club Satellite Program | 50 | Daily | Youth Activities | PH |
| Youth Activities Scholarship Program | 15 | | | PH & S8 |

(2) Family Self Sufficiency program/s

a. Participation Description

| Family Self Sufficiency (FSS) Participation | | |
|---|--|--|
| Program | Required Number of Participants (start of FY 2000 Estimate) | Actual Number of Participants (As of: 1/1/2008) |
| Public Housing | N/A | N/A |
| Section 8 | 50 | 21 |

- b. ☒ Yes ☐ No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?

If no, list steps the PHA will take below:

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- ☒ Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- ☒ Informing residents of new policy on admission and reexamination
- ☒ Actively notifying residents of new policy at times in addition to admission and reexamination.
- ☒ Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services

- ☒ Establishing a protocol for exchange of information with all appropriate TANF agencies
- ☐ Other: (list below)

D. Reserved for Community Service Requirement pursuant to section 12© of the U.S. Housing Act of 1937

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

The PHDEP program has been discontinued and rolled into the Capital Fund Program

A. Need for measures to ensure the safety of public housing residents

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- ☐ High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- ☐ High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- ☐ Residents fearful for their safety and/or the safety of their children
- ☒ Observed lower-level crime, vandalism and/or graffiti
- ☐ People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- ☒ Other (describe below)
There are a few perceived problems in one family development and two elderly developments

2. What information or data did the PHA used to determine the need for PHA actions to improve safety of residents (select all that apply).

- ☒ Safety and security survey of residents
- ☒ Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- ☐ Analysis of cost trends over time for repair of vandalism and removal of graffiti
- ☒ Resident reports
- ☒ P HA employee reports
- ☒ Police reports
- ☒ Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- ☐ Other (describe below)

3. Which developments are most affected? (list below)

North Common, Bishop Markham, Archambault Towers, George Flanagan

B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- ☒ Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- ☒ Crime Prevention Through Environmental Design
- ☒ Activities targeted to at-risk youth, adults, or seniors
- ☐ Volunteer Resident Patrol/Block Watchers Program
- ☒ Other (describe below)
 - ☒ Police Substation
 - ☒ Surveillance Cameras
 - ☒ Provision of a unit for police residence in North Common

2. Which developments are most affected? (list below)

North Common, Bishop Markham, Archambault Towers, George Flanagan

C. Coordination between PHA and the police

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- ☒ Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- ☒ Police provide crime data to housing authority staff for analysis and action
- ☒ Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- ☒ Police regularly testify in and otherwise support eviction cases
- ☒ Police regularly meet with the PHA management and residents
- ☒ Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- ☒ Other activities (list below)
 - ☒ Fingerprinting

2. Which developments are most affected? (list below)

North Common, George Flanagan, Bishop Markham, Archambault Towers, Scattered Sites, Archie Kenfick Manor (State program)

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 2002 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- ☐ Yes ☒ No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- ☐ Yes ☒ No: Has the PHA included the PHDEP Plan for FY 2002 in this PHA Plan?
- ☐ Yes ☒ No: No attached plan

14. PET POLICY

[24 CFR Part 903.7 9 (n)]

The LHA has two separate pet policies. See Administrative Plan for Low Rent Public Housing.

The Elderly Developments Pet Policy permits household pets. In general the regulation permits licensed, neutered pets such as a dog, cat, bird, fish, rodent or turtle which are registered with the LHA. In addition, the policy permits the Authority to intervene when pets are neglected or cause problems to the property or other tenants.

The Family Developments Pet Policy permits licensed, neutered pets such as a dog, cat, bird, fish, rodent or turtle which are registered with the LHA. No pets with a profile of aggression (Doberman Pinchers, Rotweilers etc.) or a danger to others (such as poisonous snakes etc.) are permitted at all in any family units. The pet cannot exceed 20 pounds in one weight and families are limited to one dog or cat per family.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations. See Attachment L.

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

1. ☒ Yes ☐ No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))? (If no, skip to component 17.)
2. ☒ Yes ☐ No: Was the most recent fiscal audit submitted to HUD?
3. ☐ Yes ☒ No: Were there any findings as the result of that audit?
4. ☐ Yes ☐ No: If there were any findings, do any remain unresolved?
If yes, how many unresolved findings remain? _____
5. ☐ Yes ☐ No: Have responses to any unresolved findings been submitted to HUD?
If not, when are they due (state below)?

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1. ☒ Yes ☐ No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?

2. What types of asset management activities will the PHA undertake? (select all that apply)

- ☐ Not applicable
- ☐ Private management
- ☒ Development-based accounting
- ☒ Comprehensive stock assessment
- ☒ Other: (list below)
 - ☒ Assessments of sub-population markets and neighborhood markets.
 - ☒ Not-for-Profit management of disabled developments using Section 8 certificates in a project based new development.
 - ☒ Supportive service contracts to third party providers for on site service programs and development of neighborhood service centers within developments.
 - ☒ Consolidation of all financial accounting under GAAP and the development of asset value of LHA holdings and the potential leverage of these for development of new affordable housing.
 - ☒ Development of personnel assets through tuition credits and reimbursements, training opportunities and through increasing skill standards for new hires.
 - ☒ Exploration of bond financing for the redevelopment of existing LRPH projects and/or the acquisition/development of replacement mixed income housing.

3. ☐ Yes ☒ No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

The LHA has combined MA 1-1 and MA 1-18 into AMP 1.

The LHA has combined MA 1-2, MA 1-7, MA1-12 and MA1-14 and MA 1-17 into AMP 2.

The LHA has combined MA 1-3 and MA 1-4 into AMP 3.

The LHA has combined MA 1-5, MA 1-6 and MA 1-11 into AMP 4.

18. Other Information

[24 CFR Part 903.7 9 ®]

A. Resident Advisory Board Recommendations

1. ☒ Yes ☐ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
☒ Attached at Attachment I
☐ Provided below:
3. In what manner did the PHA address those comments? (select all that apply)
☒ See Attachment I
☐ The PHA changed portions of the PHA Plan in response to comments
List changes below:
☒ Other: (list below)
Note: Selection of RAB members is described in Attachment H

B. Description of Election process for Residents on the PHA Board

1. ☐ Yes ☒ No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. ☒ Yes ☒ No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

The resident councils at each development submit one but no more than three names and these are then forwarded to the City Manager who after interviews, selects a resident who is then approved by City Council.

3. Description of Resident Election Process

- ☐ Candidates were nominated by resident and assisted family organizations
- ☐ Candidates could be nominated by any adult recipient of PHA assistance
- ☒ Self-nomination: Candidates registered with the PHA and requested a place on ballot
- ☐ Other: (describe)

b. Eligible candidates: (select one)

- ☐ Any recipient of PHA assistance
- ☐ Any head of household receiving PHA assistance
- ☒ Any adult recipient of PHA assistance
- ☐ Any adult member of a resident or assisted family organization
- ☐ Other (list)

c. Eligible voters: (select all that apply)

- ☒ All adult recipients of PHA assistance (public housing only)

- ☐ Representatives of all PHA resident and assisted family organizations
- ☐ Other (list)

C. Statement of Consistency with the Consolidated Plan

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: City of Lowell
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - ☒ The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below).

- Expanding affordable housing opportunities in the region
- Deconcentrating poverty concentrations, reducing poor housing conditions, especially in the Acre, where the LHA has its largest public housing concentrations.
- Supporting the development of alternative housing opportunities with specialized services for the disabled through project based HCV programs

Other: (list below)

3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
 - Use of HOME and CDBG funds to expand the supply of affordable housing in the region.
 - Use of HOME funds to partner with the LHA in the development of Project Based Section 8 housing.
 - Use of HOME and CDBG funds to partner with the LHA in the provision of supportive services and housing opportunities for persons of extremely low income.
 - Use of CDBG funds to operate youth programs with the LHA.
 - Coordination of CDBG and HOME funding for lead based paint removal and remediation.
 - Use of CDBG and HOME funds to stabilize the neighborhoods in which there is an excessive concentration of poverty, including some in which there are LHA developments.

D. Other Information Required by HUD

Use this section to provide any additional information requested by HUD.

1. Follow-up plan to the Resident Survey and Satisfaction Survey

The Resident survey results for FY 2007 have been published and we were notified that no follow-up plan was necessary. Although a follow-up plan is not necessary the LHA continues to take action to develop and implement policies for the benefit of our residents and intends to continue to follow actions to address the issues raised in the FY 2007 survey.

- A staff person has been assigned to work with Resident Councils to conduct meetings/surveys to ascertain areas of concern/dissatisfaction.
- To enhance communication management staff is encouraged to attend and support resident organization meetings and to host monthly management /resident informational meetings.
- A greater emphasis has been placed on the Implementation Plan, (Quarterly Newsletters, RAB Meetings, Postings, etc., will be publicized and site specific). Property Managers and their staff will work to ensure residents are aware of the importance of completing and returning the Resident Satisfaction Survey.
- To instill pride in their surroundings residents are encouraged to help maintain common areas and hallways clean and free of debris.
- Residents are urged to report other residents who violate and/or visitors who dirty or deface common areas and hallways.
- We aggressively pursue preventative maintenance programs by encouraging residents to report small problems before they escalate into major maintenance problems.
- In addition weekly development tours are conducted by management staff to identify and address problem areas such as common areas, parking areas, yards, lighting, etc.
- We diligently maintain the current pest control procedure.
- Purchase additional equipment to combat graffiti throughout the developments.
- In addition to in-house labor, pursue the services of residents fulfilling their community service obligations to distribute important fliers/notices in person and on a timely basis.
- Developed and implemented a Fence Policy to standardize the use of exterior fencing.
- Developed and implemented an Air Conditioner Policy common to all developments to address safety and well being of residents.
- Increase frequency of parking lot tours to address abandoned and/or illegally parked vehicles.
- Aggressively pursue eviction of lease violation of resident responsibilities.
- Video surveillance cameras have been installed in six developments including our largest family development, North Common Village. In addition, we have installed surveillance monitors in our police precinct that observe activity in our developments. The cameras help us to identify visitors (wanted and unwanted). The information we gather is sometimes used in conjunction with police investigations to identify and deter criminal activity. The surveillance systems already in place have contributed to the safety and security of our developments and neighborhoods.

- Provide office space for police precinct and encourage residents to report concerns to police officer on duty as well as property managers.
- Initiated an “Officer Friendly” program where LHA police tour our developments and introduce themselves, get to know our residents and offer assistance.
- Expanded resident communications by implementing a phone bank with Public Safety staff, making day and evening phone calls to our residents, gathering information for surveys and explaining Public Safety programs.
- Surveyed and addressed all resident parking areas for adequate lighting and installed additional lighting where needed.
- Provide on an ongoing basis information safety meetings between our residents and local police and fire staff.

2. LHA Progress in Meeting the Mission and Goals Described in the Agency Five Year Plan

See Attachment J.

3. Basic Criteria used in Determining Substantial Deviation

The LHA has determined that a substantial deviation will only occur if a formal vote of the Board of Commissioners is required for any changes to the Low Rent Public Housing Administrative Plan and the Section 8 Administrative Plan.

4. Basic Criteria used in Determining a Significant Amendment or Modification

The LHA has determined that a significant amendment or modification will only occur if a formal vote of the Board of Commissioners is required for any changes to the Capital Fund Plan which has a budgetary consequence greater than 25% and which requires a vote of the Board of Commissioners. In addition, any plan to implement a decision to demolish or dispose of a development or to designate a development as elderly only or disabled only, which already requires a hearing and Board approval process as well as HUD approval, will be considered a significant amendment or modification to the PHA Plan.

ATTACHMENTS

Use this section to provide any additional attachments referenced in the Plans.

List of Attachments

Required Attachments:

- ☒ A. Admissions Policy for Deconcentration
- ☒ B. Assessment of Site Based Waiting List Demographics
- ☒ C. FY 2004-2007 Capital Fund Program Annual & Replacement Housing Fund Statement
- ☒ D. FY 2008 Capital Fund Program Annual & Replacement Housing Fund Statement
- ☒ E. Most Recent Board-approved Operating Budget

Optional Attachments:

- ☒ F. Capital Fund Program 5 Year Action Plan
- ☒ G. LHA Staffing and Org Chart
- ☒ H. RAB Membership List
- ☒ Other (List below, providing each attachment name)
 - ☒ I. Comments of Resident Advisory Board or Boards
 - ☒ J. Progress Report (Year 3 [2007-2008] of 5 Year [2005-2009])
 - ☒ K. ACOP and Administrative Plan Amendments
 - ☒ L. Certifications

Attachment A: Deconcentration Analysis and Admissions Policy for De-Concentration

Deconcentration Analysis 3/2008

| Site | Average | | | Avg Income Per Development | Does LHA Develop Fall b/w Ranges |
|---------|---------------------------|--|--|----------------------------|----------------------------------|
| | Actual Same units Average | 85% of PHA Wide Avg Income (Avg x .85) | 115% of PHA Wide Avg Income (Avg x 1.15) | | |
| MA 1-1 | 15,422 | 13,109 | 17,735 | 13,543 | Yes |
| MA 1-2 | 15,422 | 13,109 | 17,735 | 19,156 | No |
| MA 1-7 | 15,422 | 13,109 | 17,735 | 23,509 | No |
| MA 1-12 | 15,422 | 13,109 | 17,735 | 15,405 | Yes |
| MA 1-14 | 15,422 | 13,109 | 17,735 | 17,796 | No |

MA 1-2 Average falls above range
MA 1-7 Average falls above range
MA 1-14 Average falls above range

The PHA has reviewed the analysis and has determined that its admissions preferences in its deconcentration policy have not been successful in addressing the situations at George W. Flanagan, Harold Hartwell Court (MA 1-7) and at the Scattered Sites (MA 1-12, 1-14). The LHA will monitor it quarterly and if the trends cannot be changed it will use the skipping technique ensuring that households with incomes below the combined average will be given first preference for vacancies at both of these developments.

The following is an extract from the Low Rent Public Housing Administrative Plan, approved by the Board on July 11th, 2007 which applies to this issue:

Policies on Selection and Admission of Applicants from Waiting List

Subsequent to verification of the information provided in the full application, LHA will group the applications into two tiers.

Tier 1 will include all applicants with incomes that do not exceed 30 % of median income for the Lowell area (NOTE: Families in this income category are termed Extremely Low-Income (ELI) families).

Tier 2 will include all applicants with incomes that exceed 30 % of median income but do not exceed 80 % of median income for the area (Such families are termed Low-Income Families).

Within each tier, families with local preferences will be listed first. Those preference-holders meeting the ranking preference described in Chapter 4. B. will be filed first by earliest date of pre-application, followed by preference-holders not meeting the ranking preference ordered by earliest date of pre-application.

In order to assure that the statutory income-targeting requirement that “not less than 40 % of the families admitted to a PHA’s LRPH program during the PHA fiscal year from the PHA waiting list be ELI families”, 4 of the initial 10 referrals to briefings shall be families on the waiting list who are Tier I families and 6 of the initial 10 referrals to briefings shall be Tier 2 families that are preference-holders. If there is not a sufficient number of Tier 2 preference-holders, one or more of the referrals which were to be initially Tier 2 families will Tier I preference-holders.

In addition, if the agency’s deconcentration analysis indicates that there are any developments which require targeted selection of below average or above average income families then a further tiering of applications will be done.

Tier 3 will include all covered applicants whose incomes are less than 85% of the average income of all covered families.

Tier 4 will include all covered applicants whose incomes are more than 115% of the average income of all covered families.

As units become available for any covered development under the deconcentration analysis, then in addition to the targeting tiers and procedures, skipping will be applied to admit only those applicants who are also in Tier 3 or Tier 4 as may be required.

Attachment B - Demographic Analysis - Site Based Waiting Lists

| Date Initiated | Participants | Current Mix of Racial, Ethnic or Disability Demographics | Initial Mix of Racial, Ethnic or Disability Demographics | Percent Change Between Initial and Current Mix of Racial, Ethnic or Disability Demographics |
|-----------------------|---|---|---|--|
| 1941 MA 1-1 | Disabled Elderly | 35 | 25 | 40% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 183 | 0 | 0% |
| | White | 214 | 152 | 41% |
| | Black | 45 | 27 | 67% |
| | Hispanic | 452 | 130 | 248% |
| | Asian | 138 | 241 | -43% |
| | Others | 1 | 0 | 0% |
| 1954 MA 1-2 | Disabled Elderly | 39 | 17 | 129% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 191 | 0 | 0% |
| | White | 234 | 160 | 46% |
| | Black | 50 | 25 | 100% |
| | Hispanic | 480 | 228 | 111% |
| | Asian | 139 | 117 | 19% |
| | Others | 1 | 0 | 0% |
| 1958 MA 1-3 | Disabled Elderly | 54 | 45 | 20% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 237 | 0 | 0% |
| | White | 195 | 167 | 17% |
| | Black | 17 | 12 | 42% |
| | Hispanic | 158 | 107 | 48% |
| | Asian | 40 | 60 | -33% |
| | Others | 1 | 0 | 0% |
| 1967 MA 1-4 | Disabled Elderly | 51 | 30 | 70% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 232 | 0 | 0% |
| | White | 203 | 128 | 59% |
| | Black | 15 | 11 | 36% |
| | Hispanic | 165 | 75 | 120% |
| | Asian | 35 | 33 | 6% |
| | Others | 2 | 0 | 0% |

| Date Initiated | Participants | Current Mix of Racial, Ethnic or Disability Demographics | Initial Mix of Racial, Ethnic or Disability Demographics | Percent Change Between Initial and Current Mix of Racial, Ethnic or Disability Demographics |
|---------------------------------|---|---|---|--|
| 1971 MA 1-6 | Disabled Elderly | 47 | 35 | 34% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 240 | 0 | 0% |
| | White | 213 | 156 | 37% |
| | Black | 17 | 10 | 70% |
| | Hispanic | 163 | 94 | 73% |
| | Asian | 36 | 52 | -31% |
| | Others | 3 | 0 | 0% |
| 1975 MA 1-7 | Disabled Elderly | 16 | 11 | 45% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 56 | 0 | 0% |
| | White | 139 | 106 | 31% |
| | Black | 39 | 20 | 95% |
| | Hispanic | 382 | 181 | 111% |
| | Asian | 106 | 92 | 15% |
| | Others | 0 | 0 | 0% |
| 1977 MA 1-11 | Disabled Elderly | 58 | 32 | 81% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 248 | 0 | 0% |
| | White | 229 | 162 | 41% |
| | Black | 18 | 12 | 50% |
| | Hispanic | 172 | 79 | 118% |
| | Asian | 39 | 37 | 5% |
| | Others | 3 | 0 | 0% |
| 1980/1982 MA 1-12 MA 1-14 | Disabled Elderly | 17 | 16 | 6% |
| | Non-Elderly Families with Physical Disabilities | 0 | 0 | 0% |
| | Non-Elderly Families with Other Disabilities | 63 | 0 | 0% |
| | White | 160 | 136 | 18% |
| | Black | 37 | 24 | 54% |
| | Hispanic | 389 | 200 | 95% |
| | Asian | 111 | 96 | 16% |
| | Others | 0 | 0 | 0% |

Attachment B - Demographic Analysis - Site Based Waiting Li

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 7537 | | |
| Extremely low income <=30% AMI | 6784 | 90% | |
| Very low income | 675 | 9% | |
| (>30% but <=50% AMI) | | | |
| Low income | 13 | 0% | |
| (>50% but <80% AMI) | | | |
| Disabled Elderly | 532 | 7% | |
| Non Disabled Elderly | 2141 | 28% | |
| Non-Elderly Families with Other Disabilities | 619 | 8% | |
| Other Families w/Adult | 2282 | 30% | |
| Families with Children | 1277 | 17% | |

| | | | |
|---|---------|---------|--|
| American Indian | 12 | 0% | |
| Nat Hawaiian/Pacific | 247 | 3% | |
| 0BR | 950 | #VALUE! | |
| 1BR | 3364 | #VALUE! | |
| 2 BR | 2658 | #VALUE! | |
| 3 BR | 249 | #VALUE! | |
| 4 BR | 29 | #VALUE! | |
| 5 BR | 2 | #VALUE! | |
| 5+ BR | #VALUE! | 0% | |
| Is the waiting list closed (select one)? No Yes | | | |
| If yes: | | | |
| How long has it been closed (# of months)? 54 months only for 3 & 4 BRs | | | |
| Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes | | | |
| Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes | | | |

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 332 | | 3% |
| Extremely low income <=30% AMI | 308 | 92% | |
| Very low income (>30% but <=50% AMI) | 22 | 6% | |
| Low income (>50% but <80% AMI) | 2 | 0% | |

How long has it been closed (# of months)? 12 mos

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even

ists

| | | |
|---|------|-----|
| Waiting list total | 7537 | |
| Extremely low income <=30% AMI | 6784 | 90% |
| Very low income (>30% but <=50% AMI) | 675 | 9% |
| Low income (>50% but <80% AMI) | 13 | 0% |
| Disabled Elderly | 532 | 7% |
| Non Disabled Elderly | 2141 | 28% |
| Non-Elderly Families with Other Disabilities | 619 | 8% |
| Other Families w/Adult | 2282 | 30% |
| Families with | | |

| | | |
|-----------------------------|-----|----|
| American Indian | 12 | 0% |
| Nat Hawaiian/Pa cific | 247 | 3% |

| | A | B | C | D | E | F |
|----|---|---------------|---------------------|---|----------|---|
| 1 | Housing Needs of Families on the Waiting List | | | | | |
| 2 | | | | | | |
| 3 | Waiting list type: (select one) | | | | | |
| 4 | Section 8 tenant-based assistance | | | | | |
| 5 | Federal Public Housing - North Common | | | | | |
| 6 | Combined Section 8 and Public Housing | | | | | |
| 7 | Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | | | |
| 8 | If used, identify which development/subjurisdiction: | | | | | |
| 9 | | # of families | % of total families | | Annual | |
| 10 | | | | | Turnover | |
| 11 | Waiting list total | 1175 | | | | |
| 12 | Extremely low income ≤30% AMI | 1044 | 89% | | | |
| 13 | Very low income | 118 | 10% | | | |
| 14 | (>30% but ≤50% AMI) | | 0% | | | |
| 15 | Low income | 13 | 1% | | | |
| 16 | (>50% but <80% AMI) | | 0% | | | |
| 17 | Disabled Elderly | 54 | 5% | | | |
| 18 | Non Disabled Elderly | 20 | 2% | | | |
| 19 | Non-Elderly Families with Other Disabilities | 244 | 21% | | | |
| 20 | Other Families w/Adult | 97 | 8% | | | |
| 21 | Families with Children | 671 | 57% | | | |
| 22 | Single | 89 | 8% | | | |
| 23 | Non-Elderly Families with Physical Disabilities | 0 | 0% | | | |
| 24 | White | 343 | 29% | | | |
| 25 | Black | 61 | 5% | | | |
| 26 | Hispanic | 579 | 49% | | | |
| 27 | Asian | 190 | 16% | | | |
| 28 | American Indian | 1 | 0% | | | |
| 29 | Nat Hawaiian/Pacific | 1 | 0% | | | |
| 30 | 0BR | 12 | | | | |
| 31 | | | | | | |
| 32 | | | | | | |
| 33 | | | | | | |
| 34 | | | | | | |
| 35 | | | | | | |
| 36 | | | | | | |

| | A | B | C | D | E | F |
|----|--|---|---|---|---|---|
| 39 | How long has it been closed (# of months)? 54 months only for 3 & 4 BRs | | | | | |
| 40 | Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes | | | | | |
| 41 | Does the PHA permit specific categories of families onto the waiting list, even if | | | | | |

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - George Flanagan | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 1,246 | | |
| Extremely low income <=30% AMI | 1,095 | 88% | |
| Very low income (>30% but <=50% AMI) | 138 | 11% | |
| | 13 | 1% | |
| Low income (>50% but <80% AMI) | 49 | 0% | |
| | | 4% | |
| Disabled Elderly | 18 | 1% | |
| Non Disabled Elderly | 258 | 21% | |
| Non-Elderly Families with Other Disabilities | 99 | 8% | |
| Other Families w/Adult | 729 | 59% | |
| Families with Children | 93 | 7% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 384 | 31% | |
| White | 64 | 5% | |
| Black | 594 | 48% | |
| Hispanic | 203 | 16% | |
| Asian | 0 | 0% | |
| American Indian | 1 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | 6 | | |
| 1BR | 239 | | |
| 2 BR | 916 | | |

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - Bishop Markham | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 596 | | |
| Extremely low income ≤30% AMI | 566 | 95% | |
| Very low income (>30% but ≤50% AMI) | 27 3 | 5% 1% | |
| Low income (>50% but <80% AMI) | 101 | 0% 17% | |
| Disabled Elderly | 78 | 13% | |
| Non Disabled Elderly | 318 | 53% | |
| Non-Elderly Families with Other Disabilities | 17 | 3% | |
| Other Families w/Adult | 1 | 0% | |
| Families with Children | 81 | 14% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 296 | 50% | |
| White | 26 | 4% | |
| Black | 211 | 35% | |
| Hispanic | 61 | 10% | |
| Asian | 1 | 0% | |
| American Indian | 1 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | | 3 | |
| 1BR | | 520 | |

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) Section 8 tenant-based assistance Federal Public Housing - Faulkner Street Combined Section 8 and Public Housing Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 595 | | |
| Extremely low income <=30% AMI | 555 | 93% | |
| Very low income (>30% but <=50% AMI) | 34 | 6% | |
| | 6 | 1% | |
| Low income (>50% but <80% AMI) | 94 | 0% | |
| | | 16% | |
| Disabled Elderly | 80 | 13% | |
| Non Disabled Elderly | 321 | 54% | |
| Non-Elderly Families with Other Disabilities | 22 | 4% | |
| Other Famnilies w/Adult | 1 | 0% | |
| Families with Children | 77 | 13% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 298 | 50% | |
| White | 22 | 4% | |
| Black | 213 | 36% | |
| Hispanic | 61 | 10% | |
| Asian | 0 | 0% | |
| American Indian | 1 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |

If yes:

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - Father Norton | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 636 | | |
| Extremely low income <=30% AMI | 588 | 92% | |
| Very low income (>30% but <=50% AMI) | 40 | 6% | |
| | 8 | 1% | |
| Low income (>50% but <80% AMI) | 101 | 0% | |
| | | 16% | |
| Disabled Elderly | 107 | 17% | |
| Non Disabled Elderly | 322 | 51% | |
| Non-Elderly Families with Other Disabilities | 24 | 4% | |
| Other Famnilies w/Adult | 1 | 0% | |
| Families with Children | 81 | 13% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 334 | 53% | |
| White | 24 | 4% | |
| Black | 217 | 34% | |
| Hispanic | 59 | 9% | |
| Asian | 1 | 0% | |
| American Indian | 1 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | | 3 | |

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - Archambault Towers | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 627 | | |
| Extremely low income <=30% AMI | 590 | 94% | |
| Very low income (>30% but <=50% AMI) | 31 | 5% | |
| | 6 | 1% | |
| Low income (>50% but <80% AMI) | | 0% | |
| | 96 | 15% | |
| Disabled Elderly | 87 | 14% | |
| Non Disabled Elderly | 325 | 52% | |
| Non-Elderly Families with Other Disabilities | 24 | 4% | |
| Other Famnilies w/Adult | 1 | 0% | |
| Families with Children | 94 | 15% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 321 | 51% | |
| White | 25 | 4% | |
| Black | 222 | 35% | |
| Hispanic | 57 | 9% | |
| Asian | 1 | 0% | |
| American Indian | 1 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | | 3 | |

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - Harold Hartwell | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 992 | | |
| Extremely low income <=30% AMI | 858 | 86% | |
| Very low income (>30% but <=50% AMI) | 122 | 12% | |
| | 12 | 1% | |
| Low income (>50% but <80% AMI) | 27 | 0% | |
| | | 3% | |
| Disabled Elderly | 8 | 1% | |
| Non Disabled Elderly | 119 | 12% | |
| Non-Elderly Families with Other Disabilities | 81 | 8% | |
| Other Famnilies w/Adult | 712 | 72% | |
| Families with Children | 45 | 5% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 263 | 27% | |
| White | 59 | 6% | |
| Black | 498 | 50% | |
| Hispanic | 172 | 17% | |
| Asian | 0 | 0% | |
| American Indian | 0 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | | 4 | |

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - Francis Gatehouse | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 624 | | |
| Extremely low income <=30% AMI | 582 | 93% | |
| Very low income (>30% but <=50% AMI) | 37 | 6% | |
| | 5 | 1% | |
| Low income (>50% but <80% AMI) | 101 | 0% | |
| | | 16% | |
| Disabled Elderly | 90 | 14% | |
| Non Disabled Elderly | 328 | 53% | |
| Non-Elderly Families with Other Disabilities | 20 | 3% | |
| Other Famnilies w/Adult | 1 | 0% | |
| Families with Children | 84 | 13% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 324 | 52% | |
| White | 23 | 4% | |
| Black | 218 | 35% | |
| Hispanic | 58 | 9% | |
| Asian | 0 | 0% | |
| American Indian | 1 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | 1 | | |

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

| Housing Needs of Families on the Waiting List | | | |
|---|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| Section 8 tenant-based assistance | | | |
| Federal Public Housing - Scattered Sites | | | |
| Combined Section 8 and Public Housing | | | |
| Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 1046 | | |
| Extremely low income <=30% AMI | 906 | 87% | |
| Very low income (>30% but <=50% AMI) | 128 | 12% | |
| | 12 | 1% | |
| Low income (>50% but <80% AMI) | 28 | 0% | |
| | | 3% | |
| Disabled Elderly | 10 | 1% | |
| Non Disabled Elderly | 130 | 12% | |
| Non-Elderly Families with Other Disabilities | 88 | 8% | |
| Other Famnilies w/Adult | 739 | 71% | |
| Families with Children | 51 | 5% | |
| Single | | 0% | |
| Non-Elderly Families with Physical Disabilities | 303 | 29% | |
| White | 60 | 6% | |
| Black | 514 | 49% | |
| Hispanic | 169 | 16% | |
| Asian | 0 | 0% | |
| American Indian | 0 | 0% | |
| Nat Hawaiian/Pacific | 1 | 0% | |
| 0BR | 5 | | |

How long has it been closed (# of months)? 54 months only for 3 & 4 BRs

Does the PHA expect to reopen the 3&4 BR list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if

Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|--|-------------|---|----------|---------------|--|---------------------------|--|
| Capital Fund Program and Capital Fund Program Replacement housing Fator (CFP/CF Part I: Summary | | | | | | | | | |
| PHA Name: | | Grant Type and Number: | | Capital Fund Program: | | MA06P00150107 | | Federal FY of Grant: 2007 | |
| Lowell Housing Authority | | Replacement Housing Factor Grant No: | | | | | | | |
| <input type="checkbox"/> Original Annual Statement | | <input type="checkbox"/> Reserve for Disasters/Emergencies | | <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 4/28/08) | | | | | |
| <input type="checkbox"/> Performance and Evaluation Report for Period Ending: | | | | <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | | | | | |
| | | Original | Revised | Obligated | Expended | | | | |
| 1 | Total Non-CFP Funds | | | | | | | | |
| 2 | 1406 Operations | 123,273 | 123,273 | 123,273 | | | | | |
| 3 | 1408 Management Improvements Soft Costs | 200,000 | 200,000 | | | | | | |
| | Management Improvement Hard Costs | | | | | | | | |
| 4 | 1410 Administration | 300,932 | 300,932 | 300,932 | | | | | |
| 5 | 1411 Audit | | | | | | | | |
| 6 | 1415 Liquidated Damages | | | | | | | | |
| 7 | 1430 Fees and Costs | 200,000 | 200,000 | | | | | | |
| 8 | 1440 Site Acquisition | | | | | | | | |
| 9 | 1450 Site Improvement | 100,000 | 100,000 | | | | | | |
| 10 | 1460 Dwelling Structures | 1,046,720 | 1,171,720 | 816,720 | | | | | |
| 11 | 1465.1 Dwelling Equipment-Nonexpendable | 45,382 | 45,382 | | | | | | |
| 12 | 1470 Nondwelling Structures | 185,000 | 125,000 | | | | | | |
| 13 | 1475 Nondwelling Equipment | 758,008 | 693,008 | 412,968 | | | | | |
| 14 | 1485 Demolition | | | | | | | | |
| 15 | 1490 Replacement Reserve | | | | | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | | | | | |
| 17 | 1495.1 Relocation Cost | 50,000 | 50,000 | | | | | | |
| 18 | 1499 Development Activities | | | | | | | | |
| 19 | 1502 Contingency | | | | | | | | |
| 20 | Amount of Annual Grant (Sum of line 2-19) | \$3,009,315 | \$3,009,315 | \$1,653,893 | \$ | | | | |
| | Amount of line 20 Related to LBP Activities | | | | | | | | |
| | Amount of line 20 Related to section 504 Compliance | | | | | | | | |
| | Amount of line 20 Related to Security -- Soft Costs | | | | | | | | |
| | Amount of line 20 Related to Security -- Hard Costs | | | | | | | | |
| | Amount of line 20 Related to Energy Conservation | | | | | | | | |
| | Collateralization Expenses or Debt Service | | | | | | | | |

HUD 500:

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | | |
|--|--|---|----------|----------------------|---------------------------|--------------------|-------------------|-------------|-----|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2007 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| HA-Wide | Operations | 1406 | All | 123,273 | 123,273 | | | | |
| HA-Wide | Management Improvements FSS Programs and Services- Training - Security Equipment | 1408 | All | 200,000 | 200,000 | | | | |
| HA-Wide | Administration | 1410 | All | 300,932 | 300,932 | 300,932 | | | |
| HA-Wide | Fees & Costs | 1430 | All | 200,000 | 200,000 | | | | |
| HA-Wide | Site Improvements | 1450 | All | 100,000 | 100,000 | | | | |
| HA-Wide | New Administrative Building | 1470 | All | 60,000 | 0 | | | | |
| HA-Wide Heating Upgrades for all 1460-316,720 Ameresco Moved from 1-6&1-11 elevator work items | Energy Contract | 1460 | All | 316,720 | 316,720 | 316,720 | | | |
| | Non-Routine Vacancy Prep. | 1460 | All | 65,000 | 65,000 | | | | |
| | Non-Routine PM Repairs | 1460 | All | 65,000 | 65,000 | | | | |
| | Dwelling Equipment | 1465.1 | All | 45,382 | 45,382 | | | | |
| | Non-Dwelling Equipment | 1475 | All | | | | | | |
| Relocation for Rehab | | 1495.1 | All | 50,000 | 50,000 | | | | |
| TOTALS: | | | | \$1,526,307 | \$1,401,307 | \$617,652 | \$0 | | |
| | | | | | | | | | HUC |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|--------------------------------|--------------------|-------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page:2 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2007 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 1 MA 1-1 NORTH COMMON VILLAGE 1460 work itesm moved from 1-12 units Rehab Units - 1460 | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units Kitchen, baths, windows | 1460 | | 500,000 | 500,000 | 500,000 | | On-going | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| | MA 1-1 Totals: | | | \$500,000 | \$500,000 | \$500,000 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|--------------------------------|--------------------|-------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 3 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2007 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 2 MA 1-2 GEORGE FLANAGAN DEV. 1460 - Moved from future yr. Storm Door Replacement | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior Storm Doors | 1460 | 166 | 0 | 125,000 | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-2 Totals: | | | | \$0 | \$125,000 | \$0 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|--|---|---|----------|----------------------|-----------|--------------------|---------------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages | | | | Page: 4 | | | Federal FY of Grant: 2007 | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 3 MA 1-3 BISHOP MARKHAM VILLAGE TOTAL OF 11 ELEVATORS Elevators - 1475 | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment Elevator Up-Grade | 1475 | 11 | 345,008 | 280,008 | | | | |
| MA 1-3 Totals: | | | | \$345,008 | \$280,008 | \$0 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|---------|--------------------------------|-------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 5 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2007 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 3 MA 1-4 FAULKNER STREET NO ENTRIES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-4 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|----------------------|--------------------|-------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 6 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | Federal FY of Grant: | | 2007 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Y | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 4 MA 1-5 FATHER NORTON MANOR TOTAL OF 2 ELEVATORS Elevators 1475 Contract Awarded to Associated Elevator | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment Elevator Up-Grade | 1475 | 2 | 413,000 | 413,000 | 412,968 | 0 | On-going | |
| MA 1-5 Totals: | | | | \$413,000 | \$413,000 | \$412,968 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|---------|--------------------|---------------------------|-------------|-----|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages | | | | Page: 7 | | | Federal FY of Grant: 2007 | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 4 MA 1-6 DEWEY ARCHAMBAULT TOWERS TOTAL OF 2 ELEVATORS BEGAN UP-GRADE WITH 2005 BUDGET Moved Elevator Up-Grade to Ameresco Contract | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment Elevator Up-Grade | 1475 | | | | | | | |
| MA 1-6 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |
| | | | | | | | | | HUC |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|---------|----------------------|--------------------|-------------------|-------------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 8 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: | | 2007 | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | | Total Actual Cost | | Status of V |
| | | | | Original | Revised | | Funds Obligated | Funds Expended | |
| AMP 4 | | | | | | | | | |
| MA 1-7 | Site Improvements | 1450 | | 0 | | | | | |
| HAROLD HARTWELL COURT | Mechanical & Electrical | 1460 | | | | | | | |
| NO ENTRIES | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-7 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|--|---|---|----------|----------------------|----------------------|--------------------|-------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 9 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | Federal FY of Grant: | | 2007 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 4 MA 1-11 FRANCIS GATEHOUSE TOTAL OF 1 ELEVATOR 1470 WINDOW AWNINGS REPOINT BRICK HALLWAY FLOORS & PAINTING MOVED 1475 ELEVATORS TO AMERESCO CONTRACT | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas & Exterior Bldg. Rehab | 1470 | | \$125,000 | 125,000 | | | | |
| | Site-Wide Facilities | 1470 | | \$0 | | | | | |
| | Non-Dwelling Equipment Elevator Up-Grade | 1475 | | \$0 | | | | | |
| MA 1-11 Totals: | | | | \$125,000 | \$125,000 | \$0 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|---------|----------------------|--------------------|-------------------|-------------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 10 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: | | 2007 | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | | Total Actual Cost | | Status of V |
| | | | | Original | Revised | | Funds Obligated | Funds Expended | |
| AMP 2 MA 1-12 SCATTERED SITES MOVED TO 1-1 REHAB | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-12 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | HUC |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|-----------|--------------------------------|-------------------|-------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 11 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2007 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 2 MA 1-14 SCATTERED SITES MOVED TO 1-1 REHAB Repairs to Exterior of Buildings 1460 | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 100,000 | 100,000 | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-14 Totals: | | | | \$100,000 | \$100,000 | \$0 | \$0 | | |
| HUC | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | | |
|---|---|---|----------|----------------------|---------|--------------------------------|-------------------|-------------|--|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | | |
| Part II: Supporting Pages Page: 12 | | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2007 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of V | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| AMP 2 MA 1-17 | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-17 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | | |
| HUC | | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule Page: 1 | | | | | | | | | |
|--|--|---------|---|---|---------|---------------------------|-------------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: MA06P00150107 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2007 | | | |
| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | | |
| | Original | Revised | Actual | Original | Revised | Actual | | | |
| HA/WIDE 1406 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1408 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1410 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1430 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1450 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1460 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1465.1 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1470 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1475 | 9/30/2009 | | | 9/13/2011 | | | | | |
| HA/WIDE 1495.1 | 9/30/2009 | | | 9/13/2011 | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

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Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | | |
|--|---|--|--|-------------------|
| Capital Fund Program and Capital Fund Program Replacement housing Fator (CFP/CFI Part I: Summary | | | | |
| PHA Name: | Grant Type and Number: | Federal FY of Grant: 2006 | | |
| Lowell Housing Authority | Capital Fund Program: MA06P00150206 Replacement Housing Factor Grant No: | | | |
| <input type="checkbox"/> | Original Annual Statement | <input type="checkbox"/> Reserve for Disasters/Emergencies | <input checked="" type="checkbox"/> Revised Annual Statement (revision 4/23/08) | |
| <input type="checkbox"/> | Performance and Evaluation Report for Period Ending: 3/31/08 | <input type="checkbox"/> | <input type="checkbox"/> Final Performance and Evaluation Report | |
| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost |
| | | Original | Revised | Obligated |
| 1 | Total Non-CFP Funds | 0 | | |
| 2 | 1406 Operations | 48,320 | 50,000 | |
| 3 | 1408 Management Improvements Soft Costs | 0 | | |
| | Management Improvement Hard Costs | 0 | | |
| 4 | 1410 Administration | 24,160 | 24,160 | 24,160 |
| 5 | 1411 Audit | 0 | | |
| 6 | 1415 Liquidated Damages | 0 | | |
| 7 | 1430 Fees and Costs | 0 | | |
| 8 | 1440 Site Acquisition | 0 | | |
| 9 | 1450 Site Improvement | 100,000 | 100,000 | 2,457 |
| 10 | 1460 Dwelling Structures | 45,000 | 45,000 | 0 |
| 11 | 1465.1 Dwelling Equipment-Nonexpendable | 10,000 | 10,000 | 0 |
| 12 | 1470 Nondwelling Structures | 0 | | |
| 13 | 1475 Nondwelling Equipment | 14,120 | 12,440 | 2,254 |
| 14 | 1485 Demolition | 0 | | |
| 15 | 1490 Replacement Reserve | 0 | | |
| 16 | 1492 Moving to Work Demonstration | 0 | | |
| 17 | 1495.1 Relocation Cost | 0 | | |
| 18 | 1499 Development Activities | 0 | | |
| 19 | 1502 Contingency | 0 | | |
| 20 | Amount of Annual Grant (Sum of line 2-19) | \$241,600 | \$241,600 | \$28,871 |
| | Amount of line 20 Related to LBP Activities | | | \$4,711 |
| | Amount of line 20 Related to section 504 Compliance | | | |
| | Amount of line 20 Related to Security -- Soft Costs | | | 0.119499 |
| | Amount of line 20 Related to Security -- Hard Costs | | | |
| | Amount of line 20 Related to Energy Conservation | | | |
| | Collateralization Expenses or Debt Service | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | | | |
|--|--|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| HA-Wide | Operations | 1406 | All | 48,320 | 50,000 | 50,000 | | | | |
| HA-Wide | Management Improvements FSS Programs and Services- Training - Security Equipment | 1408 | All | | | | | | | |
| HA-Wide | Administration | 1410 | All | 24,160 | 24,160 | 24,160 | | | | |
| HA-Wide | Fees & Costs | 1430 | All | | | | | | | |
| HA-Wide | Site Improvements | 1450 | All | 100,000 | 100,000 | 2,457 | 2,457 | | | |
| HA-Wide | New Administrative Building | 1470 | All | | | | | | | |
| HA-Wide | Non-Routine Vacancy Prep. | 1460 | All | 20,000 | 20,000 | 0 | 0 | | | |
| | Non-Routine PM Repairs | 1460 | All | 25,000 | 25,000 | 0 | 0 | | | |
| | Dwelling Equipment | 1465.1 | All | 10,000 | 10,000 | | | | | |
| | Non-Dwelling Equipment | 1475 | All | 14,120 | 12,440 | 2,254 | 2,254 | | | |
| | Relocation for Rehab | 1495.1 | All | | | | | | | |
| | TOTALS: | | | \$241,600 | \$241,600 | \$78,871 | \$4,711 | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page:2 | | | | | | | | | |
|---|---|---|----------|----------------------|-----------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-1 NORTH COMMON VILLAGE | Site Improvements Phase 2 | 1450 | | 100,000 | 100,000 | 2,457 | 2,457 | | |
| | Common Ave. Garrin Terrace Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-1 Totals: | | | | \$100,000 | \$100,000 | \$2,457 | \$2,457 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
|---|---|---|----------|------------------------------|---------|--------------------|-------------------|----------------|--|
| Part II: Supporting Pages | | | | Page: 3 | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | Federal FY of Grant: 2006 | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-2 GEORGE FLANAGAN DEV. | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-2 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 4 | | | | | | | | | |
|--|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-3 BISHOP MARKHAM VILLAGE | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-3 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 5 | | | | | | | | | | |
|--|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|-----|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-4 FAULKNER STREET | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-4 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 6 | | | | | | | | | | |
|--|---|---|----------|----------------------|---------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | | Funds Obligated | Funds Expended | | |
| MA 1-5 FATHER NORTON MANOR | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-5 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 7 | | | | | | | | | | |
|--|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-6 DEWEY ARCHAMBAULT TOWERS | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-6 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | | |
| HUD 50075 | | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 8 | | | | | | | | | |
|--|---|---|----------|----------------------|------------------------------|-------------------|----------------|--------------------|-------------------|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Funds Obligated | Funds Expended |
| | | | | Original | Revised | | | | |
| MA 1-7 HAROLD HARTWELL COURT | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-7 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 9 | | | | | | | | | | |
|--|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-11 FRANCIS GATEHOUSE | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-11 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | | |
| HUD 50075 | | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 10 | | | | | | | | | |
|---|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-12 SCATTERED SITES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-12 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 11 | | | | | | | | | | |
|---|---|---|----------|----------------------|---------|------------------------------|-------------------|----------------|-----|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-14 SCATTERED SITES | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-14 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| HUD 50075 | | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule Page: 1 | | | | | | | | | |
|--|--|---------|---|---|---------|--------|-------------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: MA06P00150206 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | |
| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | | |
| | Original | Revised | Actual | Original | Revised | Actual | | | |
| 1406 | 5/1/2008 | | | 5/1/2011 | | | | | |
| 1410 | 5/1/2008 | | | 5/1/2011 | | | | | |
| 1450 | 5/1/2008 | | | 5/1/2011 | | | | | |
| 1460 | 5/1/2008 | | | 5/1/2011 | | | | | |
| 1465.1 | 5/1/2008 | | | 5/1/2011 | | | | | |
| 1475 | 5/1/2008 | | | 5/1/2011 | | | | | |

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Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|--|---|--|-------------|---|-------------------|----------------------|--|------|--|
| Capital Fund Program and Capital Fund Program Replacement housing Fator (CFP/CFI Part I: Summary | | | | | | | | | |
| PHA Name: | | Grant Type and Number: | | Capital Fund Program: | | Federal FY of Grant: | | 2006 | |
| Lowell Housing Authority | | MA06P00150106 | | Replacement Housing Factor Grant No: | | | | | |
| <input type="checkbox"/> Original Annual Statement | | <input type="checkbox"/> Reserve for Disasters/Emergencies | | <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 4/23/08) | | | | | |
| <input type="checkbox"/> Performance and Evaluation Report for Period Ending: 3/31/08 | | | | <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line No. | Summary by Development Account | Total Estimated Cost | | | Total Actual Cost | | | | |
| | | Original | Revised | Obligated | Expended | | | | |
| 1 | Total Non-CFP Funds | | | | | | | | |
| 2 | 1406 Operations | 125,000 | 125,000 | 125,000 | 0 | | | | |
| 3 | 1408 Management Improvements Soft Costs | 387,437 | 479,940 | 449,370 | 449,370 | | | | |
| | Management Improvement Hard Costs | | | | | | | | |
| 4 | 1410 Administration | 285,555 | 285,555 | 285,555 | 0 | | | | |
| 5 | 1411 Audit | | | | | | | | |
| 6 | 1415 Liquidated Damages | | | | | | | | |
| 7 | 1430 Fees and Costs | | | | | | | | |
| 8 | 1440 Site Acquisition | | | | | | | | |
| 9 | 1450 Site Improvement | 475,000 | 250,000 | 100,072 | 100,072 | | | | |
| 10 | 1460 Dwelling Structures | 1,269,184 | 1,467,042 | 1,433,687 | 1,195,102 | | | | |
| 11 | 1465.1 Dwelling Equipment-Nonexpendable | 30,000 | 28,019 | 28,019 | 28,019 | | | | |
| 12 | 1470 Nondwelling Structures | | | | | | | | |
| 13 | 1475 Nondwelling Equipment | 273,380 | 220,000 | 192,142 | 4,995 | | | | |
| 14 | 1485 Demolition | | | | | | | | |
| 15 | 1490 Replacement Reserve | | | | | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | | | | | |
| 17 | 1495.1 Relocation Cost | 10,000 | 0 | 0 | 0 | | | | |
| 18 | 1499 Development Activities | | | | | | | | |
| 19 | 1502 Contingency | | | | | | | | |
| 20 | Amount of Annual Grant (Sum of line 2-19) | 2,855,556 | \$2,855,556 | \$2,613,845 | \$1,777,558 | | | | |
| | Amount of line 20 Related to LBP Activities | | | | | | | | |
| | Amount of line 20 Related to section 504 Compliance | | | | | | | | |
| | Amount of line 20 Related to Security -- Soft Costs | | | 91.54% | | | | | |
| | Amount of line 20 Related to Security -- Hard Costs | | | | | | | | |
| | Amount of line 20 Related to Energy Conservation | | | | | | | | |
| | Collateralization Expenses or Debt Service | | | | | | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 1 | | | | | | | | | | |
|--|--|---|----------|----------------------|------------------------|--------------------|-------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | Federal FY Grant: 2006 | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| HA-Wide | Operations | 1406 | All | 125,000 | 125,000 | 125,000 | 0 | On-Going | | |
| HA-Wide | Management Improvements FSS Programs and Services- Training - Security Equipment | 1408 | All | 479,940 | 479,940 | 449,370 | 449,370 | On-Going | | |
| HA-Wide | Administration | 1410 | All | 285,555 | 285,555 | 285,555 | 0 | On-Going | | |
| HA-Wide | Fees & Costs | 1430 | All | 0 | 0 | 0 | 0 | | | |
| HA-Wide | Site Improvements | 1450 | All | 475,000 | 250,000 | 100,072 | 100,072 | On-Going | | |
| HA-Wide | Non-Dwelling Structures | 1470 | All | 0 | 0 | 0 | 0 | | | |
| HA-Wide 1475 Elevator Upgrades | Non-Routine Vacancy Prep. | 1460 | All | 75,000 | 33,355 | 0 | 0 | On-Going | | |
| | Non-Routine PM Repairs | 1460 | All | 0 | 0 | 0 | 0 | On-Going | | |
| | Dwelling Equipment | 1465.1 | All | 30,000 | 28,019 | 28,019 | 28,019 | Complete | | |
| | Non-Dwelling Equipment | 1475 | All | 273,380 | 220,000 | 187,147 | 0 | On-Going | | |
| | Relaocation for Rehab | 1495.1 | All | 10,000 | 0 | 0 | 0 | On-Going | | |
| TOTALS: | | | | \$1,753,875 | \$1,421,869 | \$1,175,163 | \$577,461 | | | |

HUD 50075

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page:2 | | | | | | | | | |
|---|--|---|----------|----------------------|-----------|---------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-1 NORTH COMMON VILLAGE 1460 Item Forced Labor Moved work item 1460 dwelling units, kitchen & bath windows from 2010 & 2011 | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical Heating Upgrade and Conversion | 1460 | | 394,150 | 394,150 | 394,150 | 394,150 | Complete | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units Rehab of units Windows, Kitchen, Bath Dwelling Equipment | 1460 | | 200,000 | 405,617 | 405,617 | 167,033 | On-going | |
| | | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-1 Totals: | | | | \$594,150 | \$799,767 | \$799,767 | \$561,183 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 3 | | | | | | | | | |
|--|---|---|----------|----------------------|---------|---------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-2 GEORGE FLANAGAN DEV. | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-2 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |
| HUD 50075 | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|--|---|----------|----------------------|---------|--------------------|---------------------------|----------------|-----------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages | | | | Page: 4 | | | Federal FY of Grant: 2006 | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | | | | | |
| Development Number Name/HA-Wide Acitivities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-3 BISHOP MARKHAM VILLAGE | Site Improvements Sidewalks, Parking & Fencing | 1450 | | 0 | 0 | 0 | 0 | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-3 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |
| | | | | | | | | | HUD 50075 |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
|---|--|---|----------|----------------------|--------------------------------------|--------------------|---------------------------|----------------|--|
| Part II: Supporting Pages | | | | Page: 5 | | | Federal FY of Grant: 2006 | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 | | | Replacement Housing Factor Grant No: | | | Status of Work | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-4 FAULKNER STREET 1450 Item Vendor R. Belanger P.O. #44572 \$7,255.00 | Site Improvements Exterior Railings for Units | 1450 | | 0 | 7,225.00 | 7,225.00 | 7,225.00 | Complete | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-4 Totals: | | | | \$0 | \$7,225 | \$7,225 | \$7,225 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
|---|---|---|----------|--------------------------------------|----------|--------------------|---------------------------|-------------------|----------------|
| Part II: Supporting Pages | | | | Page: 6 | | | Federal FY of Grant: 2006 | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 | | Replacement Housing Factor Grant No: | | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Funds Expended | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-5 FATHER NORTON MANOR 1465.1 Item New stove & stove connectors | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment 95 New Stoves | 1465.1 | | 30,000 | 28,019 | 28,019 | 28,019 | Complete | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-5 Totals: | | | | \$30,000 | \$28,019 | \$28,019 | \$28,019 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
|---|--|---|----------|----------------------|-----------|------------------------------|-----------------------------|----------|--|
| Part II: Supporting Pages | | | | Page: 7 | | | Federal FY of Grant: 2006 | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | Status of Work | | |
| | | | | Original | Revised | | | | |
| MA 1-6 DEWEY ARCHAMBAULT TOWERS 1450 Item Front Drieway Light Posts, Benches Vendor Frank McMartin P.O. #44087 \$11,736.00 Machado & Son Landscaping P.O. #44085 \$8,573.00 P.O. Locksmith P.O. #44170 \$420.00 | Site Improvements Driveway, Light Posts, Benches | 1450 | | 0 | 20,729.00 | Funds Obligated 20,729 | Funds Expended 20,729 | Complete | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-6 Totals: | | | | \$0 | \$20,729 | \$20,729 | \$20,729 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | | |
|--|---|---|----------|----------------------|---------|---------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-7 HAROLD HARTWELL COURT | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-7 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 9 | | | | | | | | | |
|---|---|---|----------|----------------------|-----------|---------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-11 FRANCIS GATEHOUSE Elevator Upgrade -1475 Coordinators for Elevator - 1475 Water Proof Pit - 1475 Hydra Concrete P.O. # 45433 \$4,995.00 Brickwork - 1450 Forced Labor Account MA 1-11 Ceilings - 1450 Home Depot P.O. #43571 P.O. #43572, P.O. #43630 | Site Improvements Sidewalks, Parking and Fencing | 1450 | | 0 | 191,095 | 191,095 | 41,167 | On-going | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment Elevator Up-grade Water Proofing Pit | 1475 | | 273,380 | 220,000 | 192,142 | 4,995 | On-going | |
| | MA 1-11 Totals: | | | \$273,380 | \$411,095 | \$383,237 | \$46,162 | | |
| | HUD 50075 | | | | | | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 10 | | | | | | | | | |
|---|--|---|----------|----------------------|--------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-12 SCATTERED SITES 1450 Item Forced Labor Account Vendor | Site Improvements Westford St. wall, fence new steps | 1450 | | 0 | 30,951.00 | 30,951 | 30,951 | Complete | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior Siding, Windows, etc. | 1460 | | 100,000 | 100,000 | 100,000 | 100,000 | Complete | |
| Machado & Son Landscaping P.O. #43807 \$23,980.30 Machado & Son Landscaping P.O. #44317 \$3,500.00 Machado & Son Landscaping P.O. #43340 \$950.00 Burl Fence Co. P.O. #44316 \$1,800.00 Home Depot P.O. #43576 \$188.37 Home Depot P.O. #4364 \$189.00 Home Depot P.O. #43580 \$33.97 N.E. Cement P.O. #43653 \$120.72 | Dwelling Units Rehab Units | 1460 | | 201,621 | 201,621 | 201,621 | 201,621 | Complete | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-12 Totals: | | | | \$301,621 | \$332,572 | \$332,572 | \$332,572 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 11 | | | | | | | | | |
|---|---|---|----------|----------------------|-----------|---------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150106 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-14 SCATTERED SITES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior Siding, Windows, etc. | 1460 | | 100,000 | 100,000 | 100,000 | 100,000 | Complete | |
| | Dwelling Units Rehab Units | 1460 | | 250,000 | 232,299 | 232,299 | 232,299 | Complete | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-14 Totals: | | | | \$350,000 | \$332,299 | \$332,299 | \$332,299 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule Page: 1 | | | | | | | | | |
|--|--|---------|---|---|---------|------------------------------|-------------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2006 | | | |
| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | | |
| | Original | Revised | Actual | Original | Revised | Actual | | | |
| 1406 Operations | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1408 Management Improvements | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1410 Administration | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1430 Fees & Costs | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1470 Non-Dwelling Structures | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1460 Non-Routine Vacancy Prep. | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1460 Non-Routine PM Repairs | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1465.1 Dwelling Equipment | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1475 Non-Dwelling Equipment | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |
| 1495.1 Relocation | 9/30/2008 | | 3/31/2008 | 9/30/2010 | | | | | |

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Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | |
|--|--|--|---|
| Capital Fund Program and Capital Fund Program Replacement housing Fator (CFP/CFI Part I: Summary | | | |
| PHA Name: | Grant Type and Number: | Federal FY of Grant: 2005 | |
| Lowell Housing Authority | Capital Fund Program: MA06P00150105 | | |
| | Replacement Housing Factor Grant No: | | |
| <input type="checkbox"/> | Original Annual Statement | <input type="checkbox"/> Reserve for Disasters/Emergencies | <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 4/22/08) |
| <input checked="" type="checkbox"/> | Performance and Evaluation Report for Period Ending: 3/31/08 | <input type="checkbox"/> | <input type="checkbox"/> Final Performance and Evaluation Report |

| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
|----------|---|----------------------|-------------|-------------------|-------------|
| | | Original | Revised | Obligated | Expended |
| 1 | Total Non-CFP Funds | | | | |
| 2 | 1406 Operations | 135,000 | 135,000 | 135,000 | 129,012 |
| 3 | 1408 Management Improvements Soft Costs | 475,000 | 494,800 | 494,800 | 494,800 |
| | Management Improvement Hard Costs | | | | |
| 4 | 1410 Administration | 307,359 | 307,359 | 307,359 | 219,899 |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | 200,000 | 200,000 | 48,042 | 48,042 |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | 817,232 | 817,232 | 687,596 | 687,596 |
| 10 | 1460 Dwelling Structures | 714,000 | 714,000 | 708,833 | 708,833 |
| 11 | 1465.1 Dwelling Equipment-Nonexpendable | 0 | 0 | 0 | 0 |
| 12 | 1470 Nondwelling Structures | 425,000 | 405,200 | 405,200 | 405,200 |
| 13 | 1475 Nondwelling Equipment | 0 | 0 | 0 | 0 |
| 14 | 1485 Demolition | | | | |
| 15 | 1490 Replacement Reserve | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | |
| 17 | 1495.1 Relocation Cost | 0 | 0 | 0 | 0 |
| 18 | 1499 Development Activities | | | | |
| 19 | 1502 Contingency | | | | |
| 20 | Amount of Annual Grant (Sum of line 2-19) | \$3,073,591 | \$3,073,591 | \$2,786,830 | \$2,693,382 |
| | Amount of line 20 Related to LBP Activities | | | | |
| | Amount of line 20 Related to section 504 Compliance | | | | |
| | Amount of line 20 Related to Security -- Soft Costs | | | 90.67% | |
| | Amount of line 20 Related to Security -- Hard Costs | | | | |
| | Amount of line 20 Related to Energy Conservation | | | | |
| | Collateralization Expenses or Debt Service | | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 1 | | | | | | | | | |
|--|--|---|----------|----------------------|---------------|--------------------|------------------------------|-----------------------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | Federal FY of Grant: 2005 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| HA-Wide | Operations | 1406 | All | 135,000 | 135,000 | 129,012 | 129,012 | On-Going | |
| HA-Wide | Management Improvements FSS Programs and Services- Training - Security Equipment | 1408 | All | 475,000 | 494,800 | 494,800 | 494,800 | Complete | |
| HA-Wide | Administration | 1410 | All | 307,359 | 307,359 | 307,359 | 188,207 | On-going | |
| HA-Wide | Fees & Costs | 1430 | All | 200,000 | 200,000 | 46,442 | 46,442 | On-Going | |
| HA-Wide | Site Improvements North Common Village, MA 1-1 | 1450 | All | 817,232 | 817,232 | 687,596 | 687,596 | On-Going | |
| HA-Wide | New Administrative Building | 1470 | All | 0 | 0 | 0 | 0 | Deferred to another year | |
| HA-Wide | Non-Routine Vacancy Prep. | 1460 | All | 70,000 | 70,000 | 64,833 | 64,833 | On-Going | |
| | Non-Routine PM Repairs | 1460 | All | 70,000 | 70,000 | 70,000 | 70,000 | Complete | |
| | Dwelling Equipment | 1465.1 | All | 0 | 0 | 0 | 0 | On-Going | |
| | Non-Dwelling Equipment | 1475 | All | 0 | 0 | 0 | 0 | | |
| | Relocation for Rehab | 1495.1 | All | 0 | 0 | 0 | 0 | On-Going | |
| | TOTALS: | | | \$2,074,591 | \$2,094,391 | \$1,800,042 | \$1,680,890 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page:2 | | | | | | | | | | |
|--|---|---|----------|----------------------|---------------|--------------------|-------------------|------------------------------|--|-----------|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | | Federal FY of Grant: 2005 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | Status of Work | | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-1 NORTH COMMON VILLAGE Landscaping Contract \$364,040 Tree Removal \$2,940 Light Poles - Common Area \$2,968 | Site Improvements Landscaping/Hancock St. & Garing Terrace Area | 1450 | | 454,637 | 369,948 | 369,948 | 286,291 | On-Going | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| | MA 1-1 Totals: | | | \$454,637 | \$369,948 | \$369,948 | \$286,291 | | | |
| | | | | | | | | | | HUD 50075 |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 3 | | | | | | | | | |
|--|---|---|----------|----------------------|---------------|--------------------|------------------------------|---|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | Federal FY of Grant: 2005 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-2 GEORGE FLANAGAN DEV. NO ENTRIES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment Heating Upgrade & Conversion | 1475 | All | 0 | | | | Heating Upgrade deferred to Mgt. Improvements | |
| MA 1-2 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 4 | | | | | | | | | |
|--|---|---|----------|----------------------|---------------|--------------------|------------------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | Federal FY of Grant: 2005 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-3 BISHOP MARKHAM VILLAGE NO ENTRIES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-3 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 5 | | | | | | | | | |
|--|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2005 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-4 FAULKNER STREET NO ENTRIES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-4 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 6 | | | | | | | | | |
|---|---|---|----------|----------------------|---------------|-------------------|------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | Federal FY of Grant: 2005 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | Status of Work | | |
| | | | | Original | Revised | | | | |
| MA 1-5 FATHER NORTON MANOR NO ENTRIES | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-5 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |
| HUD 50075 | | | | | | | | | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 7 | | | | | | | | | |
|---|--|---|------------|----------------------|------------------------------|--------------------|-------------------|------------------------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150105 | | | Federal FY of Grant: 2005 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-6 DEWEY ARCHAMBAULT TOWERS Moved funds from 1-6 work item - office & units Also moved funds from Admn. Bldg. to 1-6 work item Front Entrance Driveway Lights Benches | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units Convert Office to Units \$247,066 | 1460 | 9 Units | 0 | 0 | 0 | 0 | Deferred to future years. | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas Elevators | 1470 | | 425,000 | 405,200 | 405,200 | 405,200 | Complete | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-6 Totals: | | | | \$425,000 | \$405,200 | \$405,200 | \$405,200 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 8 | | | | | | | | | | |
|---|---|---|----------|----------------------|---------------|-------------------|------------------------------|--------------------|-------------------|-----------|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | Federal FY of Grant: 2005 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | Status of Work | | | |
| | | | | Original | Revised | | | Funds Obligated | Funds Expended | |
| MA 1-7 HAROLD HARTWELL COURT NO ENTRIES | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-7 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | | |
| | | | | | | | | | | HUD 50075 |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 9 | | | | | | | | | | |
|---|---|---|----------|----------------------|----------|------------------------------|-----------------------------|------------------------------|--|-----------|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | MA06P00150105 | | Federal FY of Grant: 2005 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | Status of Work | | | |
| | | | | Original | Revised | | | | | |
| MA 1-11 FRANCIS GATEHOUSE All Services Plumbing Domestic Water Lines Common Area | Site Improvements Replace Domestic Water Lines in Common Area | 1450 | | 0 | 17,750 | Funds Obligated 17,750 | Funds Expended 17,750 | Complete | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-11 Totals: | | | | \$0 | \$17,750 | \$17,750 | \$17,750 | | | |
| | | | | | | | | | | HUD 50075 |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 10 | | | | | | | | | | |
|---|---|---|----------|----------------------|------------------------------|--------------------|-------------------|------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150105 | | | Federal FY of Grant: 2005 | | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-12 SCATTERED SITES | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | All | 0 | 0 | 0 | 0 | Deferred to future budget | | |
| | Dwelling Units | 1460 | All | 574,000 | 574,000 | 574,000 | 574,000 | Complete | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-12 Totals: | | | | \$574,000 | \$574,000 | \$574,000 | \$574,000 | | | |
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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 11 | | | | | | | | | | |
|--|--|---|----------|----------------------|---------------|-------------------|------------------------------|--|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | MA06P00150105 | | Federal FY of Grant: 2005 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | Status of Work | | | |
| | | | | Original | Revised | | | | | |
| MA 1-14 SCATTERED SITES | Site Improvements Parking Area & Driveway Lincoln Street | 1450 | | 0 | 12,480 | 12,480 | Complete | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | All | 0 | 0 | 0 | Deferred to future budget | | | |
| | Dwelling Units | 1460 | All | 0 | 0 | 0 | Deferred to future budget | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-14 Totals: | | | | \$0 | \$12,480 | \$12,480 | \$12,480 | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule Page: 1 | | | | | | | | | | |
|--|--|---------|---|---|---------|--------|-------------------------------------|--|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: MA06P00150105 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2005 | | | |
| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | | | |
| | Original | Revised | Actual | Original | Revised | Actual | | | | |
| HA WIDE 1406 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1408 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1410 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1430 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1450 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1460 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1465.1 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1470 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1475 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |
| HA WIDE 1495.1 | 9/30/2007 | | 9/30/2007 | 9/30/2009 | | | | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement housing Fator (CFP/CFI Part I: Summary | | | | |
|--|---|--|-------------|-------------------|
| PHA Name: Lowell Housing Authority | Grant Type and Number: Capital Fund Program: MA06P00150104 Replacement Housing Factor Grant No: | Federal FY of Grant: 2004 | | |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending:03/31/08 | | <input type="checkbox"/> Reserve for Disasters/Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:3/12/08) <input checked="" type="checkbox"/> Final Performance and Evaluation Report | | |
| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost |
| | | Original | Revised | Obligated |
| 1 | Total Non-CFP Funds | | | |
| 2 | 1406 Operations | 110,000 | 110,000 | 110,000 |
| 3 | 1408 Management Improvements Soft Costs | 271,054 | 269,179 | 269,179 |
| | Management Improvement Hard Costs | | | |
| 4 | 1410 Administration | 318,909 | 318,909 | 318,909 |
| 5 | 1411 Audit | | | |
| 6 | 1415 Liquidated Damages | | | |
| 7 | 1430 Fees and Costs | 120,275 | 120,275 | 120,275 |
| 8 | 1440 Site Acquisition | | | |
| 9 | 1450 Site Improvement | 220,157 | 222,032 | 222,032 |
| 10 | 1460 Dwelling Structures | 2,148,687 | 2,148,687 | 2,148,687 |
| 11 | 1465.1 Dwelling Equipment-Nonexpendable | 0 | 0 | 0 |
| 12 | 1470 Nondwelling Structures | 0 | 0 | 0 |
| 13 | 1475 Nondwelling Equipment | | | |
| 14 | 1485 Demolition | | | |
| 15 | 1490 Replacement Reserve | | | |
| 16 | 1492 Moving to Work Demonstration | | | |
| 17 | 1495.1 Relocation Cost | 0 | 0 | 0 |
| 18 | 1499 Development Activities | | | |
| 19 | 1502 Contingency | | | |
| 20 | Amount of Annual Grant (Sum of line 2-19) | \$3,189,082 | \$3,189,082 | \$3,189,082 |
| | Amount of line 20 Related to LBP Activities | | | |
| | Amount of line 20 Related to section 504 Compliance | | | |
| | Amount of line 20 Related to Security -- Soft Costs | | 100% | |
| | Amount of line 20 Related to Security -- Hard Costs | | | |
| | Amount of line 20 Related to Energy Conservation | | | |
| | Collateralization Expenses or Debt Service | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 1 | | | | | | | | | |
|--|--|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2004 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| HA-Wide | Operations | 1406 | All | 110,000 | 110,000 | 110,000 | 110,000 | Complete | |
| HA-Wide | Management Improvements FSS Programs and Services- Training - Security Equipment | 1408 | All | 271,054 | 269,179 | 269,179 | 269,179 | Complete | |
| HA-Wide | Administration | 1410 | All | 318,909 | 318,909 | 318,909 | 318,909 | Complete | |
| HA-Wide | Fees & Costs | 1430 | All | 120,157 | 120,275 | 120,275 | 120,275 | Complete | |
| HA-Wide | Site Improvements | 1450 | All | 220,157 | 222,032 | 222,032 | 222,032 | Complete | |
| HA-Wide | New Administrative Building Deferred | 1470 | All | 0 | 0 | 0 | 0 | | |
| HA-Wide | Non-Routine Vacancy Prep. | 1460 | All | 75,000 | 50,407 | 50,407 | 50,407 | Complete | |
| | Non-Routine PM Repairs | 1460 | All | 66,754 | 66,754 | 66,754 | 66,754 | Complete | |
| | Dwelling Equipment | 1465.1 | All | 0 | 0 | 0 | 0 | | |
| | Non-Dwelling Equipment | 1475 | All | | | | | | |
| | Relocation for Rehab | 1495.1 | All | 0 | 0 | 0 | 0 | | |
| TOTALS: | | | | \$1,182,031 | \$1,157,556 | \$1,157,556 | \$1,157,556 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page:2 | | | | | | | | | |
|---|--|---|------------------------|----------------------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2004 | | Status of Work | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-1 NORTH COMMON VILLAGE New work item.04/07/05 gas line testing&repair. development 70 yr. old No bids received for gasline repiar, deferred to heating up-grade. \$861,192 | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical Heating Up-grade Gas line testing&repair | 1460 1460 1460 | 524 Units 524 Units | \$0 0 0 | \$0 \$0 \$0 | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-1 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|--|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 3 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P0015014 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-2 GEORGE FLANAGAN DEV. | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-2 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 4 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-3 BISHOP MARKHAM VILLAGE | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-3 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report | | | | | | | | | |
|---|---|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) | | | | | | | | | |
| Part II: Supporting Pages Page: 5 | | | | | | | | | |
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-4 FAULKNER STREET | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-4 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 6 | | | | | | | | | | |
|--|--|---|-----------|----------------------|-------------|------------------------------|-------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-5 FATHER NORTON MANOR Sprinkler system Interior Hallways Entrances Apartment doors Carpet Painting | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units Interior Common Areas, Halls, & Entrances | 1460 | 112 units | 1,432,593 | 1,432,593 | 1,432,593 | 1,432,593 | Complete | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas Interior Halls & Entrance | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-5 Totals: | | | | 1,432,593 | \$1,432,593 | \$1,432,593 | \$1,432,593 | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 7 | | | | | | | | | |
|--|---|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-6 DEWEY ARCHAMBAULT TOWERS | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-6 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 8 | | | | | | | | | |
|--|---|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-7 HAROLD HARTWELL COURT | Site Improvements | 1450 | | 0 | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-7 Totals: | | | | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 9 | | | | | | | | | | |
|---|---|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|-----|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2004 | | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-11 FRANCIS GATEHOUSE | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| | MA 1-11 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | |

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 10 | | | | | | | | | | |
|---|---|--|----------|----------------------|-----------|--------------------|------------------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: MA061P00150104 Replacement Housing Factor Grant No: | | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-12 SCATTERED SITES Rehab units, forced labor account. | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | | | |
| | Building Exterior | 1460 | All | 0 | | | | | | |
| | Dwelling Units | 1460 | 45 Units | 574,340 | 598,933 | 598,933 | 598,933 | Complete | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | | |
| MA 1-12 Totals: | | | | \$574,340 | \$598,933 | \$598,933 | \$598,933 | | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | | | |
|--|---|-------------------|---|----------------------|---------|--------------------|------------------------------|----------------|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | | |
| MA 1-14 SCATTERED SITES Deferred to MA 1-12 | Site Improvements | 1450 | | 0 | | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | | |
| | Building Exterior | 1460 | All | 0 | | | | | | |
| | Dwelling Units | 1460 | 60 Units | 0 | | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | | |
| Non-Dwelling Equipment | 1475 | | 0 | | | | | | | |
| MA 1-14 Totals: | | | | \$0 | \$0 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule Page: 1 | | | | | | | | | |
|--|--|---------|---|---|---------|--------|-------------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: MA06P00150104 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2004 | | |
| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | | |
| | Original | Revised | Actual | Original | Revised | Actual | | | |
| HA-wide items | 09/06 | | 09/06 | 09/08 | | 03/08 | | | |
| NCV/MA 1-1 1460 | 09/06 | | 09/06 | 09/08 | | 03/08 | | | |
| FNM/MA 1-5 1470 | 09/06 | | 09/06 | 09/08 | | 03/08 | | | |
| MA 1-12/SS 1460 | 09/06 | | 09/06 | 09/08 | | 03/08 | | | |
| MA 1-14/SS 1460 | 09/06 | | 09/06 | 09/08 | | 03/08 | | | |
| Administration Building 1470 | 09/06 | | 09/06 | 09/08 | | 03/08 | | | |

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Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement housing Fator (CFP/CFPP Part I: Summary

| | | |
|--|--|----------------------------------|
| PHA Name: Lowell Housing Authority | Grant Type and Number: Capital Fund Program: Replacement Housing Factor Grant No: | Federal FY of Grant: 2008 |
|--|--|----------------------------------|

| | | |
|---|--|---|
| <input checked="" type="checkbox"/> Original Annual Statement | <input type="checkbox"/> Reserve for Disasters/Emergencies | <input type="checkbox"/> Revised Annual Statement (revision no:) |
| <input type="checkbox"/> Performance and Evaluation Report for Period Ending: | <input type="checkbox"/> Final Performance and Evaluation Report | |

| Line No. | Summary by Development Account | Total Estimated Cost | | | Total Actual Cost | |
|----------|---|----------------------|---------|-----------|-------------------|-----|
| | | Original | Revised | Obligated | Expended | |
| 1 | Total Non-CFP Funds | | | | | |
| 2 | 1406 Operations | 18,025 | | | | |
| 3 | 1408 Management Improvements Soft Costs | 200,000 | | | | |
| | Management Improvement Hard Costs | | | | | |
| 4 | 1410 Administration | 297,892 | | | | |
| 5 | 1411 Audit | | | | | |
| 6 | 1415 Liquidated Damages | | | | | |
| 7 | 1430 Fees and Costs | 100,000 | | | | |
| 8 | 1440 Site Acquisition | | | | | |
| 9 | 1450 Site Improvement | 178,000 | | | | |
| 10 | 1460 Dwelling Structures | 1,830,000 | | | | |
| 11 | 1465.1 Dwelling Equipment-Nonexpendable | 70,000 | | | | |
| 12 | 1470 Nondwelling Structures | 25,000 | | | | |
| 13 | 1475 Nondwelling Equipment | 250,000 | | | | |
| 14 | 1485 Demolition | | | | | |
| 15 | 1490 Replacement Reserve | | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | | |
| 17 | 1495.1 Relocation Cost | 10,000 | | | | |
| 18 | 1499 Development Activities | | | | | |
| 19 | 1502 Contingency | | | | | |
| 20 | Amount of Annual Grant (Sum of line 2-19) | \$2,978,917 | \$0 | \$0 | \$0 | \$0 |
| | Amount of line 20 Related to LBP Activities | | | | | |
| | Amount of line 20 Related to section 504 Compliance | | | | | |
| | Amount of line 20 Related to Security -- Soft Costs | | | | | |
| | Amount of line 20 Related to Security -- Hard Costs | | | | | |
| | Amount of line 20 Related to Energy Conservation | | | | | |
| | Collateralization Expenses or Debt Service | | | | | |

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Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages **Page: 1**

| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA-Wide | Operations | 1406 | All | 18,025 | | | | |
| HA-Wide | Management Improvements FSS Programs and Services- Training - Security Equipment | 1408 | All | 200,000 | | | | |
| HA-Wide | Administration | 1410 | All | 297,892 | | | | |
| HA-Wide | Fees & Costs | 1430 | All | 100,000 | | | | |
| HA-Wide | Site Improvements | 1450 | All | | | | | |
| HA-Wide | New Administrative Building | 1470 | All | | | | | |
| HA-Wide | Non-Routine Vacancy Prep. | 1460 | All | 5,000 | | | | |
| | Non-Routine PM Repairs | 1460 | All | 5,000 | | | | |
| | Dwelling Equipment | 1465.1 | All | | | | | |
| | Non-Dwelling Equipment | 1475 | All | | | | | |
| | Relocation for Rehab | 1495.1 | All | 10,000 | | | | |
| | TOTALS: | | | \$635,917 | \$0 | \$0 | \$0 | |

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Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages **Page:2**

| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| AMP 1 | | | | Original | Revised | Funds Obligated | Funds Expended | |
| MA 1-1 NORTH COMMON VILLAGE | Site Improvements Walks, Driveways, Railings Landscaping | 1450 | | 50,000 | | | | |
| | Mechanical & Electrical | 1460 | | | | | | |
| | Building Exterior Roof Repairs | 1460 | 33 | 125,000 | | | | |
| | Dwelling Units Rehab of units moved from 2010 & 2011 | 1460 | 336 | 550,000 | | | | |
| | Dwelling Equipment Stoves, Refrigerators Washers, Dryers | 1465.1 | 506 | 20,000 | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | |
| | MA 1-1 Totals: | | | \$745,000 | \$0 | \$0 | \$0 | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 3 | | | | | | | | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| AMP 2 | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-2 GEORGE FLANAGAN DEV. Added Siding Replacement Morse Street | Site Improvements Fencing, Walks, Driveways, Landscaping | 1450 | | 50,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior Siding/Morse Street | 1460 | | 50,000 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 25,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities Drainage Central Storage | 1470 | | 25,000 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-2 Totals: | | | | \$150,000 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 4 | | | | | | | | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| AMP 3 | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-3 BISHOP MARKHAM VILLAGE | Site Improvements Fencing, Walks, Driveways, Landscaping | 1450 | | 10,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment Generator | 1475 | | 150,000 | | | | | |
| MA 1-3 Totals: | | | | \$160,000 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 5 | | | | | | | | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| AMP 3 | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-4 FAULKNER STREET | Site Improvements Fencing, Walks, Driveways, Landscaping | 1450 | | 5,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 2,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-4 Totals: | | | | \$7,000 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 6 | | | | | | | | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| AMP 4 | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-5 FATHER NORTON MANOR | Site Improvements Fencing, Walks, Driveways, Landscaping | 1450 | | 10,000 | | | | | |
| | Mechanical & Electrical Hallway Sprinklers | 1460 | | 300,000 | | | | | |
| | Building Exterior Paint Exterior of Building | 1460 | | 135,000 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 1,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-5 Totals: | | | | \$446,000 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 7 | | | | | | | | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| AMP 4 | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-6 DEWEY ARCHAMBAULT TOWERS | Site Improvements Fencing, Walks, Driveways, Landscaping | 1450 | | 2,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior Exterior Canopy | 1460 | | 100,000 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 10,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-6 Totals: | | | | \$112,000 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 8 | | | | | | | | | |
|--|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 2 MA 1-7 HAROLD HARTWELL COURT | Site Improvements Fencing, Walks, Driveways, Walls | 1450 | | 30,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 2,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-7 Totals: | | | | \$32,000 | \$0 | \$0 | \$0 | | |

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| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | | |
|--|--|---|----------|----------------------|------------------------------|--------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2008 | | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 4 MA 1-11 FRANCIS GATEHOUSE | Site Improvements Fencing, Walks, Driveways, Landscaping | 1450 | | 10,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior Repointing Brick Work | 1460 | | 60,000 | | | | | |
| | Dwelling Units Kitchen & Baths Handicapped Rehab | 1460 | | 350,000 | | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment generator | 1475 | | 100,000 | | | | | |
| MA 1-11 Totals: | | | | \$520,000 | \$0 | \$0 | \$0 | | |

HUD 50075

| Annual Statement/Performance and Evaluating Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 10 | | | | | | | | | |
|---|---|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| AMP 2 | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| MA 1-12 SCATTERED SITES | Site Improvements Fencing, Walks, Driveways | 1450 | | 5,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units Rehab of Units | 1460 | | 150,000 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 5,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-12 Totals: | | | | \$160,000 | \$0 | \$0 | \$0 | | |

HUD 50075

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages Page: 11 | | | | | | | | | |
|---|--|---|----------|----------------------|---------|------------------------------|-------------------|----------------|--|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2008 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work | |
| | | | | Original | Revised | Funds Obligated | Funds Expended | | |
| AMP 2 MA 1-14 SCATTERED SITES | Site Improvements Fencing, Walks, Landscaping | 1450 | | 6,000 | | | | | |
| | Mechanical & Electrical | 1460 | | | | | | | |
| | Building Exterior | 1460 | | 0 | | | | | |
| | Dwelling Units | 1460 | | 0 | | | | | |
| | Dwelling Equipment Stoves, Refrigerators | 1465.1 | | 5,000 | | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | | |
| MA 1-14 Totals: | | | | \$11,000 | \$0 | \$0 | \$0 | | |

HUD 50075

Annual Statement/Performance and Evaluation Report
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

| Part II: Supporting Pages | | Page: 12 | | Federal FY of Grant: 2008 | |
|--|--|--|----------|---------------------------|--------------------------------|
| PHA Name: Lowell Housing Authority | | Grant Type and Number Capital Fund Program Grant No: | | Federal FY of Grant: 2008 | |
| | | Replacement Housing Factor Grant No: | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Total Estimated | Status of Work |
| | | | | Original Revised | Funds Obligated Funds Expended |
| AMP 2 MA 1-17 | Site Improvements | 1450 | | 0 | |
| | Mechanical & Electrical | 1460 | | 0 | |
| | Building Exterior | 1460 | | 0 | |
| | Dwelling Units | 1460 | | 0 | |
| | Dwelling Equipment | 1465.1 | | 0 | |
| | Interior Common Areas | 1470 | | 0 | |
| | Site-Wide Facilities | 1470 | | 0 | |
| | Non-Dwelling Equipment | 1475 | | 0 | |
| MA 1-17 TOTALS | | | | \$0 \$0 | \$0 |

**Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**

Part II: Supporting Pages **Page: 13**

| | | |
|--|--|------------------------------------|
| PHA Name: Lowell Housing Authority | Grant Type and Number Capital Fund Program Grant No: | Federal FY of Grant 2008 |
|--|--|------------------------------------|

| | | Replacement Housing Factor Grant No: | | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|-----------------|-----------------------------|----------------|----------------------------------|---------------------------------|-----------------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct. No. | Quantity | Original | Revised | Funds Obligated | Funds Expended | |
| AMP 1 | | | | | | | | |
| MA 1-18 | Site Improvements | 1450 | | 0 | | | | |
| | Mechanical & Electrical | 1460 | | 0 | | | | |
| | Building Exterior | 1460 | | 0 | | | | |
| | Dwelling Units | 1460 | | 0 | | | | |
| | Dwelling Equipment | 1465.1 | | 0 | | | | |
| | Interior Common Areas | 1470 | | 0 | | | | |
| | Site-Wide Facilities | 1470 | | 0 | | | | |
| | Non-Dwelling Equipment | 1475 | | 0 | | | | |
| | MA 1-18 TOTALS | | | \$0 | \$0 | \$0 | \$0 | |

Attachment C

FY 2007 CFP Statement

Page 13 Part II

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule Page: 1 | | | | | | | | | |
|--|--|---------|-----------------------|---|---------|----------------------|-------------------------------------|--|--|
| PHA Name: Lowell Housing Authority | | | Grant Type and Number | | | Federal FY of Grant: | | | |
| Replacement Housing Factor Grant No: | | | | | | | | | |
| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | | |
| | Original | Revised | Actual | Original | Revised | Actual | | | |
| HA/WIDE 1406 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1408 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1410 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1430 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1450 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1460 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1465.1 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1470 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1475 | 9/30/2010 | | | 9/30/2012 | | | | | |
| HA/WIDE 1495.1 | 9/30/2010 | | | 9/30/2012 | | | | | |
| | | | | | | | | | |

HUD 50075

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 1641

HUD MA001-C

Department

Total Salaries & Benefits \$ 3,663,290

Total Other \$ 8,262,011

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------|-------------|-----------------------------------|----------------|----------------|----------------|------------------|--------------|
| REVENUES | | | | | | | |
| 703 | 3110.00 | Dwelling Rental Income | 277.27 | 287.02 | 292.62 | 5,762,225 | |
| 704 | 3120.00 | Excess Utilities | - | - | - | | |
| 704 | 3692.00 | Tenant Revenue - Other | - | - | - | - | |
| 704 | | Total Tenant Revenue Other | - | - | - | - | |
| 705 | | Total Tenant Revenue | 277.27 | 287.02 | 292.62 | 5,762,225 | |
| 706 | 8020.00 | Current Year Operating Subsidy | 298.97 | 337.19 | 348.31 | 6,858,897 | |
| 711 | 3610.00 | Investment Income - Unrestricted | 2.29 | 3.81 | 4.98 | 98,000 | |
| 720 | 3431.00 | Investment Income - Restricted | - | - | - | | |
| 715 | 3190.00 | Section 8 Rental Income | - | - | - | | |
| 715 | 3690.00 | Other Revenue | 10.92 | 10.92 | 7.62 | 150,000 | |
| 715 | 3690.15 | Admin Fee | - | - | - | - | |
| 715 | | Total Other Revenue | 10.92 | 10.92 | 7.62 | 150,000 | |
| 716 | 6120.00 | Gain/(Loss) on Equipment Disposal | - | - | - | - | |
| 1001 | 9110.00 | Operating Transfers - In | 12.70 | 21.07 | 10.03 | 197,592 | |
| | | Capital Grant Allocation | - | - | - | | |
| | | Other Grant Allocation | - | - | - | | |
| | | Section 8 Allocation | - | - | - | - | |
| 700 | | Total Revenue | 602.15 | 660.01 | 663.55 | 13,066,714 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 1641

HUD MA001-C

Department

Total Salaries & Benefits \$ 3,663,290

Total Other \$ 8,262,011

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------------------|-------------|--|----------------|----------------|----------------|------------------|----------------------------------|
| ADMINISTRATIVE EXPENSES | | | | | | | |
| 911 | 4110.00 | Salaries - Reg. | 79.62 | 77.57 | 34.18 | 673,051 | |
| 911 | 4110.01 | Salaries - O.T. | - | - | 0.91 | 18,000 | |
| 911 | 4110.00 | Total Administrative Salaries | 79.62 | 77.57 | 35.09 | 691,051 | |
| 912 | 4171.00 | Auditing Fees | 0.36 | 0.36 | 0.36 | 7,000 | |
| 915 | 4540.00 | Employee Benefit Contributions - Admin | 38.78 | 35.02 | 15.69 | 309,017 | |
| 916 | 4130.00 | Legal | 5.08 | 5.08 | 5.08 | 100,000 | |
| 916 | 4140.00 | Staff Training | 1.02 | 1.27 | 0.97 | 19,040 | |
| 916 | 4150.00 | Travel / Parking | 1.04 | 1.04 | 1.05 | 20,627 | |
| 916 | 4170.00 | Accounting Fees | 0.32 | 0.34 | 0.84 | 16,600 | |
| 916 | 4190.01 | Stationary / Supplies | - | - | 3.14 | 61,750 | |
| 916 | 4190.02 | Telephone | - | - | 4.06 | 80,000 | |
| 916 | 4190.04 | Advertisement | - | - | - | - | |
| 916 | 4190.05 | Publications | - | - | 0.13 | 2,573 | |
| 916 | 4190.06 | Equipment Maintenance & Repair | - | - | 4.06 | 80,000 | |
| 916 | 4190.07 | Membership Dues & Fees | - | - | 0.05 | 1,029 | |
| 916 | 4190.08 | Armored Car Service | - | - | - | - | |
| 916 | 4190.09 | Consulting Fees | - | - | - | - | |
| 916 | 4190.10 | Miscellaneous Sundry | 17.05 | 17.05 | 2.03 | 40,000 | |
| 916 | 4190.11 | Court Costs | - | - | 1.32 | 25,963 | |
| 916 | 4190.12 | Fiscal Agent Fees | - | - | - | - | |
| 916 | 4190.13 | Data Processing | - | - | - | - | |
| 916 | 4190.14 | Office Equipment Purchases <\$500 | - | - | - | - | |
| 916 | 4190.17 | Temporary Labor | - | - | - | - | |
| 916 | 4190.18 | Reproduction | - | - | - | - | |
| 916 | 4190.19 | Sundry | - | - | - | - | |
| 916 | 4190.20 | Drug Testing | - | - | - | - | |
| 916 | 4190.21 | Administrative Fees | - | - | - | - | |
| 916 | 4190.00 | Sundry Administrative | 24.51 | 24.78 | 22.73 | 447,582 | |
| 913 | | Asset Management Fee | - | - | 75.68 | 1,490,291 | \$58.18 + \$7.50 + \$10.00 x AUM |
| | | Total Administrative Expense | 143.27 | 137.73 | 149.55 | 2,944,940 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 1641

HUD MA001-C

Department

Total Salaries & Benefits \$ 3,663,290

Total Other \$ 8,262,011

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|---|-------------|--|----------------|----------------|----------------|------------------|--------------|
| TENANT SERVICES | | | | | | | |
| 921 | 4210.00 | Salaries - Reg. | 5.20 | 5.32 | 5.33 | 105,000 | |
| 921 | 4210.01 | Salaries - O.T. | - | - | - | - | |
| 921 | 4210.00 | Total Tenant Services Salaries | 5.20 | 5.32 | 5.33 | 105,000 | |
| 923 | 4540.00 | Employee Benefit Contributions | 2.53 | 2.40 | 2.38 | 46,953 | |
| 924 | 4220.00 | Recreation & Publications | 3.70 | 3.05 | - | - | |
| 924 | 4230.00 | Contract Costs | 0.26 | 0.26 | - | - | |
| 924 | | Total Non-Salary | 3.96 | 3.31 | - | - | |
| | | Total Tenant Services Expense | 11.69 | 11.03 | 7.72 | 151,953 | |
| UTILITIES | | | | | | | |
| 935 | 4355.01 | Labor - Reg. | 7.62 | 7.81 | 8.13 | 160,000 | |
| 935 | 4355.02 | Labor - O.T. | - | - | - | - | |
| 935 | 4355.00 | Total Utilities Labor | 7.62 | 7.81 | 8.13 | 160,000 | |
| 937 | 4540.00 | Employee Benefit Contributions | 3.71 | 3.53 | 3.63 | 71,547 | |
| 931 | 4310.00 | Water (Includes Sewer Charges) | 34.55 | 33.47 | 33.47 | 659,078 | |
| 932 | 4320.00 | Electricity | 62.50 | 83.46 | 83.46 | 1,643,533 | |
| 933 | 4330.00 | Gas | 97.42 | 123.82 | 123.82 | 2,438,169 | |
| 938 | 4390.00 | Other | - | - | - | - | |
| | | Total Utility Expense | 205.80 | 252.09 | 252.50 | 4,972,327 | |
| ORDINARY MAINTENANCE & OPERATION | | | | | | | |
| 941 | 4410.00 | Labor - Reg. | 95.56 | 98.58 | 76.18 | 1,500,181 | |
| 941 | 4410.01 | Labor - O.T. | - | - | 3.81 | 75,117 | |
| 941 | 4410.00 | Total Maintenance Labor | 95.56 | 98.58 | 80.00 | 1,575,298 | |
| 942 | 4420.00 | Materials and Other | 21.58 | 20.82 | 22.75 | 448,000 | |
| 943 | 4430.01 | Auto Rentals & Repair | - | - | - | - | |
| 943 | 4430.02 | Lock & Key Repair | - | - | - | - | |
| 943 | 4430.03 | Electrical Repairs | - | - | - | - | |
| 943 | 4430.04 | Structural Repairs | - | - | 0.25 | 5,000 | |
| 943 | 4430.05 | Equipment Repairs & Rentals | - | - | 0.27 | 5,231 | |
| 943 | 4430.06 | Repairs & Rentals | - | - | - | - | |
| 943 | 4430.07 | Heating & AC Repairs | - | - | 0.23 | 4,600 | |
| 943 | 4430.08 | Elevator Maintenance | - | - | 2.64 | 52,000 | |
| 943 | 4430.09 | Heaters & Ranges | - | - | - | - | |
| 943 | 4430.10 | Engineers & Consultants | - | - | - | - | |
| 943 | 4430.11 | Fire & Alarm Services | - | - | 0.64 | 12,510 | |
| 943 | 4430.14 | Licenses & Permits | - | - | - | - | |
| 943 | 4430.15 | Auto Allowances | - | - | - | - | |
| 943 | 4430.16 | Garbage Truck Repairs | - | - | - | - | |
| 943 | 4430.17 | Sewage & Plumbing | - | - | - | - | |
| 943 | 4430.18 | Paving & Fencing | - | - | - | - | |
| 943 | 4430.19 | Grass Cutting | - | - | - | - | |
| 943 | 4430.20 | Other Contract Costs | 25.90 | 28.23 | 1.52 | 30,000 | |
| 943 | 4430.22 | Garbage Collection | - | - | 8.93 | 175,907 | |
| 943 | 4430.23 | Tree Removal | - | - | - | - | |
| 943 | 4430.24 | Pest Control | - | - | 5.73 | 112,913 | |
| 943 | 4430.25 | Uniforms | - | - | 0.10 | 2,000 | |
| 943 | 4430.26 | Work Tasks | - | - | - | - | |
| 943 | | Total Contract Costs | 25.90 | 28.23 | 20.32 | 400,161 | |
| 945 | 4540.00 | Employee Benefit Contributions | 46.54 | 44.50 | 35.77 | 704,424 | |
| | | Total Ordinary Maintenance & Operation | 189.58 | 192.13 | 158.84 | 3,127,883 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 1641

HUD MA001-C

Department

Total Salaries & Benefits \$ 3,663,290

Total Other \$ 8,262,011

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|-------------------------------------|-------------|--|----------------|----------------|----------------|------------------|--------------------------|
| PROTECTIVE SERVICES | | | | | | | |
| 951 | 4465.01 | Labor | | - | - | - | |
| 951 | 4465.02 | Labor - O.T. | | - | - | - | |
| 951 | 4465.00 | Total Protective Services Labor | | - | - | - | |
| 952 | 4480.00 | Contract Costs | - | - | - | - | |
| 955 | 4540.00 | Employee Benefit Contributions | | - | - | - | |
| | | Total Protective Services | - | - | - | - | |
| GENERAL | | | | | | | |
| 961 | 4510.01 | Insurance - General Coverage | 24.64 | 24.66 | 1.83 | 35,993 | |
| 961 | 4510.02 | Workmans Compensation | - | | 3.64 | 71,717 | |
| 961 | 4510.03 | Self Insurance - Liability | - | - | 8.31 | 163,564 | |
| 961 | 4510.04 | Self Insurance - Fire | - | - | 9.05 | 178,273 | |
| 961 | | Total Insurance | 24.64 | 24.66 | 22.83 | 449,548 | |
| 963 | 4520.00 | Payments in Lieu of Taxes | 7.62 | 8.38 | 4.01 | 78,990 | HUD formula - form 52267 |
| 964 | 4570.00 | Collection Losses | 2.54 | 2.54 | - | - | |
| 967 | 4580.00 | Interest Expense | - | - | - | - | |
| 968 | 4530.00 | Terminal Leave | 2.54 | 1.52 | - | - | |
| | | Total General Expenses | 37.34 | 37.10 | 26.84 | 528,538 | |
| TOTAL ROUTINE EXPENDITURES | | | | | | | |
| 969 | | Total Routine Operating Expense | 587.68 | 630.08 | 595.45 | 11,725,640 | |
| 970 | | Excess Operating Revenue over Operating Expenses | 14.47 | 287,093.44 | 68.10 | 1,341,074 | |
| NON-ROUTINE EXPENDITURES | | | | | | | |
| 971 | 4610.00 | Extraordinary Maintenance | 11.68 | 4.57 | 5.84 | 115,000 | |
| | | Capital Needs | 4.35 | 3.16 | 4.30 | 84,660 | |
| | | Total Non-Routine Expenses | 16.03 | 7.73 | 10.14 | 199,660 | |
| RESIDUAL RECEIPTS OR DEFICIT | | | | | | | |
| 900 | | Total Expenses | 603.71 | 637.81 | 605.59 | 11,925,300 | |
| | | Excess Operating Revenue over Operating Expenses | (1.56) | 22.20 | 57.96 | 1,141,414 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 524

AMP 1

MA 1-1, 1-18

Total Salaries & Benefits \$ 1,075,566

Department

Total Other \$ 2,614,859

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------|-------------|-----------------------------------|----------------|----------------|----------------|------------------|--------------|
| REVENUES | | | | | | | |
| 703 | 3110.00 | Dwelling Rental Income | 277.27 | 287.02 | 297.23 | 1,869,000 | |
| 704 | 3120.00 | Excess Utilities | - | - | - | - | |
| 704 | 3692.00 | Tenant Revenue - Other | - | - | - | - | |
| 704 | | Total Tenant Revenue Other | - | - | - | - | |
| 705 | | Total Tenant Revenue | 277.27 | 287.02 | 297.23 | 1,869,000 | |
| 706 | 8020.00 | Current Year Operating Subsidy | 298.97 | 337.19 | 348.31 | 2,190,166 | |
| 711 | 3610.00 | Investment Income - Unrestricted | 2.29 | 3.81 | 4.98 | 31,291 | |
| 720 | 3431.00 | Investment Income - Restricted | - | - | - | - | |
| 715 | 3190.00 | Section 8 Rental Income | - | - | - | - | |
| 715 | 3690.00 | Other Revenue | 10.92 | 10.92 | 7.62 | 47,895 | |
| 715 | 3690.15 | Admin Fee | - | - | - | - | |
| 715 | | Total Other Revenue | 10.92 | 10.92 | 7.62 | 47,895 | |
| 716 | 6120.00 | Gain/(Loss) on Equipment Disposal | - | - | - | - | |
| 1001 | 9110.00 | Operating Transfers - In | 12.70 | 21.07 | 10.03 | 63,095 | |
| | | Capital Grant Allocation | - | - | - | - | |
| | | Other Grant Allocation | - | - | - | - | |
| | | Section 8 Allocation | - | - | - | - | |
| 700 | | Total Revenue | 602.15 | 660.01 | 668.17 | 4,201,447 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 524

AMP 1

MA 1-1, 1-18

Total Salaries & Benefits \$ 1,075,566

Department

Total Other \$ 2,614,859

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------------------|-------------|--|----------------|----------------|----------------|------------------|----------------------------------|
| ADMINISTRATIVE EXPENSES | | | | | | | |
| 911 | 4110.00 | Salaries - Reg. | 79.62 | 77.57 | 26.16 | 164,486 | |
| 911 | 4110.01 | Salaries - O.T. | - | - | 0.91 | 5,748 | |
| 911 | 4110.00 | Total Administrative Salaries | 79.62 | 77.57 | 27.07 | 170,234 | |
| 912 | 4171.00 | Auditing Fees | 0.36 | 0.36 | 0.36 | 2,235 | |
| 915 | 4540.00 | Employee Benefit Contributions - Admin | 38.78 | 35.02 | 12.11 | 76,123 | |
| 916 | 4130.00 | Legal | 5.08 | 5.08 | 5.08 | 31,932 | |
| 916 | 4140.00 | Staff Training | 1.02 | 1.27 | 0.97 | 6,080 | |
| 916 | 4150.00 | Travel / Parking | 1.04 | 1.04 | 1.05 | 6,587 | |
| 916 | 4170.00 | Accounting Fees | 0.32 | 0.34 | 0.84 | 5,301 | |
| 916 | 4190.01 | Stationary / Supplies | - | - | 3.14 | 19,718 | |
| 916 | 4190.02 | Telephone | - | - | 4.06 | 25,545 | |
| 916 | 4190.04 | Advertisement | - | - | - | - | |
| 916 | 4190.05 | Publications | - | - | 0.13 | 822 | |
| 916 | 4190.06 | Equipment Maintenance & Repair | - | - | 4.06 | 25,545 | |
| 916 | 4190.07 | Membership Dues & Fees | - | - | 0.05 | 329 | |
| 916 | 4190.08 | Armored Car Service | - | - | - | - | |
| 916 | 4190.09 | Consulting Fees | - | - | - | - | |
| 916 | 4190.10 | Miscellaneous Sundry | 17.05 | 17.05 | 2.03 | 12,773 | |
| 916 | 4190.11 | Court Costs | - | - | 1.32 | 8,290 | |
| 916 | 4190.12 | Fiscal Agent Fees | - | - | - | - | |
| 916 | 4190.13 | Data Processing | - | - | - | - | |
| 916 | 4190.14 | Office Equipment Purchases <\$500 | - | - | - | - | |
| 916 | 4190.17 | Temporary Labor | - | - | - | - | |
| 916 | 4190.18 | Reproduction | - | - | - | - | |
| 916 | 4190.19 | Sundry | - | - | - | - | |
| 916 | 4190.20 | Drug Testing | - | - | - | - | |
| 916 | 4190.21 | Administrative Fees | - | - | - | - | |
| 916 | 4190.00 | Sundry Administrative | 24.51 | 24.78 | 22.73 | 142,921 | |
| 913 | | Asset Management Fee | - | - | 75.68 | 475,876 | \$58.18 + \$7.50 + \$10.00 x AUM |
| | | Total Administrative Expense | 143.27 | 137.73 | 137.94 | 867,388 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 524

AMP 1

MA 1-1, 1-18

Total Salaries & Benefits \$ 1,075,566

Department

Total Other \$ 2,614,859

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|---|-------------|--|----------------|----------------|----------------|------------------|--------------|
| TENANT SERVICES | | | | | | | |
| 921 | 4210.00 | Salaries - Reg. | 5.20 | 5.32 | 5.33 | 33,500 | |
| 921 | 4210.01 | Salaries - O.T. | - | - | - | - | |
| 921 | 4210.00 | Total Tenant Services Salaries | 5.20 | 5.32 | 5.33 | 33,500 | |
| 923 | 4540.00 | Employee Benefit Contributions | 2.53 | 2.40 | 2.38 | 14,980 | |
| 924 | 4220.00 | Recreation & Publications | 3.70 | 3.05 | | | |
| 924 | 4230.00 | Contract Costs | 0.26 | 0.26 | - | | |
| 924 | | Total Non-Salary | 3.96 | 3.31 | - | - | |
| | | Total Tenant Services Expense | 11.69 | 11.03 | 7.71 | 48,480 | |
| UTILITIES | | | | | | | |
| 935 | 4355.01 | Labor - Reg. | - | | 8.11 | 51,000 | |
| 935 | 4355.02 | Labor - O.T. | - | - | - | - | |
| 935 | 4355.00 | Total Utilities Labor | 7.62 | 7.81 | 8.11 | 51,000 | |
| 937 | 4540.00 | Employee Benefit Contributions | 3.71 | 3.53 | 3.63 | 22,806 | |
| 931 | 4310.00 | Water (Includes Sewer Charges) | 34.55 | 33.47 | 33.47 | 210,455 | |
| 932 | 4320.00 | Electricity | 62.50 | 83.46 | 83.46 | 524,809 | |
| 933 | 4330.00 | Gas | 97.42 | 123.82 | 123.82 | 778,550 | |
| 938 | 4390.00 | Other | - | - | - | - | |
| | | Total Utility Expense | 205.80 | 252.09 | 252.48 | 1,587,620 | |
| ORDINARY MAINTENANCE & OPERATION | | | | | | | |
| 941 | 4410.00 | Labor - Reg. | 95.56 | 98.58 | 73.87 | 464,501 | |
| 941 | 4410.01 | Labor - O.T. | - | - | 3.81 | 23,986 | |
| 941 | 4410.00 | Total Maintenance Labor | 95.56 | 98.58 | 77.69 | 488,487 | |
| 942 | 4420.00 | Materials and Other | 21.58 | 20.82 | 17.49 | 110,000 | |
| 943 | 4430.01 | Auto Rentals & Repair | - | - | - | | |
| 943 | 4430.02 | Lock & Key Repair | - | - | - | | |
| 943 | 4430.03 | Electrical Repairs | - | - | - | | |
| 943 | 4430.04 | Structural Repairs | - | - | 0.25 | 1,597 | |
| 943 | 4430.05 | Equipment Repairs & Rentals | - | - | - | | |
| 943 | 4430.06 | Repairs & Rentals | - | - | - | | |
| 943 | 4430.07 | Heating & AC Repairs | - | - | 0.05 | 300 | |
| 943 | 4430.08 | Elevator Maintenance | - | - | - | | |
| 943 | 4430.09 | Heaters & Ranges | - | - | - | | |
| 943 | 4430.10 | Engineers & Consultants | - | - | - | | |
| 943 | 4430.11 | Fire & Alarm Services | - | - | 0.48 | 3,045 | |
| 943 | 4430.14 | Licenses & Permits | - | - | - | | |
| 943 | 4430.15 | Auto Allowances | - | - | - | | |
| 943 | 4430.16 | Garbage Truck Repairs | - | - | - | | |
| 943 | 4430.17 | Sewage & Plumbing | - | - | - | | |
| 943 | 4430.18 | Paving & Fencing | - | - | - | | |
| 943 | 4430.19 | Grass Cutting | - | - | - | | |
| 943 | 4430.20 | Other Contract Costs | 25.90 | 28.23 | 1.52 | 9,580 | |
| 943 | 4430.22 | Garbage Collection | - | - | 11.51 | 72,371 | |
| 943 | 4430.23 | Tree Removal | - | - | - | | |
| 943 | 4430.24 | Pest Control | - | - | 6.20 | 38,996 | |
| 943 | 4430.25 | Uniforms | - | - | 0.10 | 639 | |
| 943 | 4430.26 | Work Tasks | - | - | - | - | |
| 943 | | Total Contract Costs | 25.90 | 28.23 | 20.12 | 126,527 | |
| 945 | 4540.00 | Employee Benefit Contributions | 46.54 | 44.50 | 34.74 | 218,436 | |
| | | Total Ordinary Maintenance & Operation | 189.58 | 192.13 | 150.04 | 943,450 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 524**AMP 1**

MA 1-1, 1-18

Total Salaries & Benefits \$ 1,075,566

Department

Total Other \$ 2,614,859

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|-------------------------------------|-------------|--|----------------|----------------|----------------|------------------|--------------------------|
| PROTECTIVE SERVICES | | | | | | | |
| 951 | 4465.01 | Labor | | - | | | |
| 951 | 4465.02 | Labor - O.T. | | - | - | | |
| 951 | 4465.00 | Total Protective Services Labor | | - | | | |
| 952 | 4480.00 | Contract Costs | - | | | | |
| 955 | 4540.00 | Employee Benefit Contributions | | - | - | | |
| | | Total Protective Services | - | | | | |
| GENERAL | | | | | | | |
| 961 | 4510.01 | Insurance - General Coverage | 24.64 | 24.66 | 1.83 | 11,493 | |
| 961 | 4510.02 | Workmans Compensation | - | | 3.64 | 22,901 | |
| 961 | 4510.03 | Self Insurance - Liability | - | | 8.31 | 52,229 | |
| 961 | 4510.04 | Self Insurance - Fire | - | - | 9.05 | 56,926 | |
| 961 | | Total Insurance | 24.64 | 24.66 | 22.83 | 143,548 | |
| 963 | 4520.00 | Payments in Lieu of Taxes | 7.62 | 8.38 | 4.47 | 28,138 | HUD formula - form 52267 |
| 964 | 4570.00 | Collection Losses | 2.54 | 2.54 | | | |
| 967 | 4580.00 | Interest Expense | - | | | | |
| 968 | 4530.00 | Terminal Leave | 2.54 | 1.52 | - | | |
| | | Total General Expenses | 37.34 | 37.10 | 27.30 | 171,686 | |
| TOTAL ROUTINE EXPENDITURES | | | | | | | |
| 969 | | Total Routine Operating Expense | 587.68 | 630.08 | 575.48 | 3,618,624.71 | |
| 970 | | Excess Operating Revenue over Operating Expenses | 14.47 | 287,093.44 | 92.69 | 582,822 | |
| NON-ROUTINE EXPENDITURES | | | | | | | |
| 971 | 4610.00 | Extraordinary Maintenance | 11.68 | 4.57 | 4.77 | 30,000 | |
| | | Capital Needs | 4.35 | 3.16 | 6.65 | 41,800 | |
| | | Total Non-Routine Expenses | 16.03 | 7.73 | 11.42 | 71,800 | |
| RESIDUAL RECEIPTS OR DEFICIT | | | | | | | |
| 900 | | Total Expenses | 603.71 | 637.81 | 586.90 | 3,690,425 | |
| | | Excess Operating Revenue over Operating Expenses | (1.56) | 22.20 | 81.27 | 511,022 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 300

AMP 2

MA 1-2, 1-7, 1-12, 1-14, 1-17

Total Salaries & Benefits \$ 823,476

Department

Total Other \$ 1,500,247

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------|-------------|-----------------------------------|----------------|----------------|----------------|------------------|--------------|
| REVENUES | | | | | | | |
| 703 | 3110.00 | Dwelling Rental Income | 277.27 | 287.02 | 323.95 | 1,166,225 | |
| 704 | 3120.00 | Excess Utilities | - | - | - | - | |
| 704 | 3692.00 | Tenant Revenue - Other | - | - | - | - | |
| 704 | | Total Tenant Revenue Other | - | - | - | - | |
| 705 | | Total Tenant Revenue | 277.27 | 287.02 | 323.95 | 1,166,225 | |
| 706 | 8020.00 | Current Year Operating Subsidy | 298.97 | 337.19 | 348.31 | 1,253,912 | |
| 711 | 3610.00 | Investment Income - Unrestricted | 2.29 | 3.81 | 4.98 | 17,914 | |
| 720 | 3431.00 | Investment Income - Restricted | - | - | - | - | |
| 715 | 3190.00 | Section 8 Rental Income | - | - | - | - | |
| 715 | 3690.00 | Other Revenue | 10.92 | 10.92 | 7.62 | 27,420 | |
| 715 | 3690.15 | Admin Fee | - | - | - | - | |
| 715 | | Total Other Revenue | 10.92 | 10.92 | 7.62 | 27,420 | |
| 716 | 6120.00 | Gain/(Loss) on Equipment Disposal | - | - | - | - | |
| 1001 | 9110.00 | Operating Transfers - In | 12.70 | 21.07 | 10.03 | 36,123 | |
| | | Capital Grant Allocation | - | - | - | - | |
| | | Other Grant Allocation | - | - | - | - | |
| | | Section 8 Allocation | - | - | - | - | |
| 700 | | Total Revenue | 602.15 | 660.01 | 694.89 | 2,501,594 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 300

AMP 2

MA 1-2, 1-7, 1-12, 1-14, 1-17

Total Salaries & Benefits \$ 823,476

Department

Total Other \$ 1,500,247

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------------------|-------------|--|----------------|----------------|----------------|------------------|----------------------------------|
| ADMINISTRATIVE EXPENSES | | | | | | | |
| 911 | 4110.00 | Salaries - Reg. | 79.62 | 77.57 | 46.55 | 167,576 | |
| 911 | 4110.01 | Salaries - O.T. | - | - | 0.91 | 3,291 | |
| 911 | 4110.00 | Total Administrative Salaries | 79.62 | 77.57 | 47.46 | 170,866 | |
| 912 | 4171.00 | Auditing Fees | 0.36 | 0.36 | 0.36 | 1,280 | |
| 915 | 4540.00 | Employee Benefit Contributions - Admin | 38.78 | 35.02 | 21.22 | 76,406 | |
| 916 | 4130.00 | Legal | 5.08 | 5.08 | 5.08 | 18,282 | |
| 916 | 4140.00 | Staff Training | 1.02 | 1.27 | 0.97 | 3,481 | |
| 916 | 4150.00 | Travel / Parking | 1.04 | 1.04 | 1.05 | 3,771 | |
| 916 | 4170.00 | Accounting Fees | 0.32 | 0.34 | 0.84 | 3,035 | |
| 916 | 4190.01 | Stationary / Supplies | - | - | 3.14 | 11,289 | |
| 916 | 4190.02 | Telephone | - | - | 4.06 | 14,625 | |
| 916 | 4190.04 | Advertisement | - | - | - | - | |
| 916 | 4190.05 | Publications | - | - | 0.13 | 470 | |
| 916 | 4190.06 | Equipment Maintenance & Repair | - | - | 4.06 | 14,625 | |
| 916 | 4190.07 | Membership Dues & Fees | - | - | 0.05 | 188 | |
| 916 | 4190.08 | Armored Car Service | - | - | - | - | |
| 916 | 4190.09 | Consulting Fees | - | - | - | - | |
| 916 | 4190.10 | Miscellaneous Sundry | 17.05 | 17.05 | 2.03 | 7,313 | |
| 916 | 4190.11 | Court Costs | - | - | 1.32 | 4,746 | |
| 916 | 4190.12 | Fiscal Agent Fees | - | - | - | - | |
| 916 | 4190.13 | Data Processing | - | - | - | - | |
| 916 | 4190.14 | Office Equipment Purchases <\$500 | - | - | - | - | |
| 916 | 4190.17 | Temporary Labor | - | - | - | - | |
| 916 | 4190.18 | Reproduction | - | - | - | - | |
| 916 | 4190.19 | Sundry | - | - | - | - | |
| 916 | 4190.20 | Drug Testing | - | - | - | - | |
| 916 | 4190.21 | Administrative Fees | - | - | - | - | |
| 916 | 4190.00 | Sundry Administrative | 24.51 | 24.78 | 22.73 | 81,825 | |
| 913 | | Asset Management Fee | - | - | 75.68 | 272,448 | \$58.18 + \$7.50 + \$10.00 x AUM |
| | | Total Administrative Expense | 143.27 | 137.73 | 167.45 | 602,825 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 300

AMP 2

MA 1-2, 1-7, 1-12, 1-14, 1-17

Total Salaries & Benefits \$ 823,476

Department

Total Other \$ 1,500,247

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|---|-------------|--|----------------|----------------|----------------|------------------|--------------|
| TENANT SERVICES | | | | | | | |
| 921 | 4210.00 | Salaries - Reg. | 5.20 | 5.32 | 5.28 | 19,000 | |
| 921 | 4210.01 | Salaries - O.T. | - | - | - | | |
| 921 | 4210.00 | Total Tenant Services Salaries | 5.20 | 5.32 | 5.28 | 19,000 | |
| 923 | 4540.00 | Employee Benefit Contributions | 2.53 | 2.40 | 2.36 | 8,496 | |
| 924 | 4220.00 | Recreation & Publications | 3.70 | 3.05 | | | |
| 924 | 4230.00 | Contract Costs | 0.26 | 0.26 | - | | |
| 924 | | Total Non-Salary | 3.96 | 3.31 | - | - | |
| | | Total Tenant Services Expense | 11.69 | 11.03 | 7.64 | 27,496 | |
| UTILITIES | | | | | | | |
| 935 | 4355.01 | Labor - Reg. | - | - | 8.19 | 29,500 | |
| 935 | 4355.02 | Labor - O.T. | - | - | - | - | |
| 935 | 4355.00 | Total Utilities Labor | 7.62 | 7.81 | 8.19 | 29,500 | |
| 937 | 4540.00 | Employee Benefit Contributions | 3.71 | 3.53 | 3.66 | 13,191 | |
| 931 | 4310.00 | Water (Includes Sewer Charges) | 34.55 | 33.47 | 33.47 | 120,490 | |
| 932 | 4320.00 | Electricity | 62.50 | 83.46 | 83.46 | 300,463 | |
| 933 | 4330.00 | Gas | 97.42 | 123.82 | 123.82 | 445,735 | |
| 938 | 4390.00 | Other | - | - | - | - | |
| | | Total Utility Expense | 205.80 | 252.09 | 252.61 | 909,379 | |
| ORDINARY MAINTENANCE & OPERATION | | | | | | | |
| 941 | 4410.00 | Labor - Reg. | 95.56 | 98.58 | 93.31 | 335,927 | |
| 941 | 4410.01 | Labor - O.T. | - | - | 3.81 | 13,733 | |
| 941 | 4410.00 | Total Maintenance Labor | 95.56 | 98.58 | 97.13 | 349,660 | |
| 942 | 4420.00 | Materials and Other | 21.58 | 20.82 | 22.22 | 80,000 | |
| 943 | 4430.01 | Auto Rentals & Repair | - | - | - | - | |
| 943 | 4430.02 | Lock & Key Repair | - | - | - | - | |
| 943 | 4430.03 | Electrical Repairs | - | - | - | - | |
| 943 | 4430.04 | Structural Repairs | - | - | 0.25 | 914 | |
| 943 | 4430.05 | Equipment Repairs & Rentals | - | - | - | - | |
| 943 | 4430.06 | Repairs & Rentals | - | - | - | - | |
| 943 | 4430.07 | Heating & AC Repairs | - | - | 0.14 | 500 | |
| 943 | 4430.08 | Elevator Maintenance | - | - | - | - | |
| 943 | 4430.09 | Heaters & Ranges | - | - | - | - | |
| 943 | 4430.10 | Engineers & Consultants | - | - | - | - | |
| 943 | 4430.11 | Fire & Alarm Services | - | - | 0.26 | 945 | |
| 943 | 4430.14 | Licenses & Permits | - | - | - | - | |
| 943 | 4430.15 | Auto Allowances | - | - | - | - | |
| 943 | 4430.16 | Garbage Truck Repairs | - | - | - | - | |
| 943 | 4430.17 | Sewage & Plumbing | - | - | - | - | |
| 943 | 4430.18 | Paving & Fencing | - | - | - | - | |
| 943 | 4430.19 | Grass Cutting | - | - | - | - | |
| 943 | 4430.20 | Other Contract Costs | 25.90 | 28.23 | 1.52 | 5,484 | |
| 943 | 4430.22 | Garbage Collection | - | - | 8.40 | 30,228 | |
| 943 | 4430.23 | Tree Removal | - | - | - | - | |
| 943 | 4430.24 | Pest Control | - | - | 8.53 | 30,701 | |
| 943 | 4430.25 | Uniforms | - | - | 0.10 | 366 | |
| 943 | 4430.26 | Work Tasks | - | - | - | - | |
| 943 | | Total Contract Costs | 25.90 | 28.23 | 19.21 | 69,138 | |
| 945 | 4540.00 | Employee Benefit Contributions | 46.54 | 44.50 | 43.43 | 156,357 | |
| | | Total Ordinary Maintenance & Operation | 189.58 | 192.13 | 181.99 | 655,155 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 300

AMP 2

MA 1-2, 1-7, 1-12, 1-14, 1-17

Total Salaries & Benefits \$ 823,476

Department

Total Other \$ 1,500,247

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|-------------------------------------|-------------|--|----------------|----------------|----------------|------------------|--------------------------|
| PROTECTIVE SERVICES | | | | | | | |
| 951 | 4465.01 | Labor | | - | | | |
| 951 | 4465.02 | Labor - O.T. | | - | - | | |
| 951 | 4465.00 | Total Protective Services Labor | | - | | | |
| 952 | 4480.00 | Contract Costs | - | - | | | |
| 955 | 4540.00 | Employee Benefit Contributions | | - | - | | |
| | | Total Protective Services | - | - | | | |
| GENERAL | | | | | | | |
| 961 | 4510.01 | Insurance - General Coverage | 24.64 | 24.66 | 1.83 | 6,580 | |
| 961 | 4510.02 | Workmans Compensation | - | | 3.64 | 13,111 | |
| 961 | 4510.03 | Self Insurance - Liability | - | | 8.31 | 29,902 | |
| 961 | 4510.04 | Self Insurance - Fire | - | - | 9.05 | 32,591 | |
| 961 | | Total Insurance | 24.64 | 24.66 | 22.83 | 82,184 | |
| 963 | 4520.00 | Payments in Lieu of Taxes | 7.62 | 8.38 | 7.13 | 25,685 | HUD formula - form 52267 |
| 964 | 4570.00 | Collection Losses | 2.54 | 2.54 | - | | |
| 967 | 4580.00 | Interest Expense | - | - | | | |
| 968 | 4530.00 | Terminal Leave | 2.54 | 1.52 | - | | |
| | | Total General Expenses | 37.34 | 37.10 | 29.96 | 107,869 | |
| TOTAL ROUTINE EXPENDITURES | | | | | | | |
| 969 | | Total Routine Operating Expense | 587.68 | 630.08 | 639.65 | 2,302,723 | |
| 970 | | Excess Operating Revenue over Operating Expenses | 14.47 | 287,093.44 | 55.24 | 198,871 | |
| NON-ROUTINE EXPENDITURES | | | | | | | |
| 971 | 4610.00 | Extraordinary Maintenance | 11.68 | 4.57 | 5.56 | 20,000 | |
| | | Capital Needs | 4.35 | 3.16 | 0.28 | 1,000 | |
| | | Total Non-Routine Expenses | 16.03 | 7.73 | 5.83 | 21,000 | |
| RESIDUAL RECEIPTS OR DEFICIT | | | | | | | |
| 900 | | Total Expenses | 603.71 | 637.81 | 645.48 | 2,323,723 | |
| | | Excess Operating Revenue over Operating Expenses | (1.56) | 22.20 | 49.41 | 177,871 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 426

AMP 3

MA 1-3, 1-4

Total Salaries & Benefits \$ 879,125

Department

Total Other \$ 2,158,816

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------|-------------|-----------------------------------|----------------|----------------|----------------|------------------|--------------|
| REVENUES | | | | | | | |
| 703 | 3110.00 | Dwelling Rental Income | 277.27 | 287.02 | 273.87 | 1,400,000 | |
| 704 | 3120.00 | Excess Utilities | - | - | - | - | |
| 704 | 3692.00 | Tenant Revenue - Other | - | - | - | - | |
| 704 | | Total Tenant Revenue Other | - | - | - | - | |
| 705 | | Total Tenant Revenue | 277.27 | 287.02 | 273.87 | 1,400,000 | |
| 706 | 8020.00 | Current Year Operating Subsidy | 298.97 | 337.19 | 348.31 | 1,780,555 | |
| 711 | 3610.00 | Investment Income - Unrestricted | 2.29 | 3.81 | 4.98 | 25,441 | |
| 720 | 3431.00 | Investment Income - Restricted | - | - | - | - | |
| 715 | 3190.00 | Section 8 Rental Income | - | - | - | - | |
| 715 | 3690.00 | Other Revenue | 10.92 | 10.92 | 7.62 | 38,940 | |
| 715 | 3690.15 | Admin Fee | - | - | - | - | |
| 715 | | Total Other Revenue | 10.92 | 10.92 | 7.62 | 38,940 | |
| 716 | 6120.00 | Gain/(Loss) on Equipment Disposal | - | - | - | - | |
| 1001 | 9110.00 | Operating Transfers - In | 12.70 | 21.07 | 10.03 | 51,294 | |
| | | Capital Grant Allocation | - | - | - | - | |
| | | Other Grant Allocation | - | - | - | - | |
| | | Section 8 Allocation | - | - | - | - | |
| 700 | | Total Revenue | 602.15 | 660.01 | 644.80 | 3,296,230 | |

Direct

Project Level

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 426

AMP 3

MA 1-3, 1-4

Total Salaries & Benefits \$ 879,125

Department

Total Other \$ 2,158,816

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------------------|-------------|--|----------------|----------------|----------------|------------------|----------------------------------|
| ADMINISTRATIVE EXPENSES | | | | | | | |
| 911 | 4110.00 | Salaries - Reg. | 79.62 | 77.57 | 33.12 | 169,287 | |
| 911 | 4110.01 | Salaries - O.T. | - | - | 0.91 | 4,673 | |
| 911 | 4110.00 | Total Administrative Salaries | 79.62 | 77.57 | 34.03 | 173,960 | |
| 912 | 4171.00 | Auditing Fees | 0.36 | 0.36 | 0.36 | 1,817 | |
| 915 | 4540.00 | Employee Benefit Contributions - Admin | 38.78 | 35.02 | 15.22 | 77,789 | |
| 916 | 4130.00 | Legal | 5.08 | 5.08 | 5.08 | 25,960 | |
| 916 | 4140.00 | Staff Training | 1.02 | 1.27 | 0.97 | 4,943 | |
| 916 | 4150.00 | Travel / Parking | 1.04 | 1.04 | 1.05 | 5,355 | |
| 916 | 4170.00 | Accounting Fees | 0.32 | 0.34 | 0.84 | 4,309 | |
| 916 | 4190.01 | Stationary / Supplies | - | - | 3.14 | 16,030 | |
| 916 | 4190.02 | Telephone | - | - | 4.06 | 20,768 | |
| 916 | 4190.04 | Advertisement | - | - | - | - | |
| 916 | 4190.05 | Publications | - | - | 0.13 | 668 | |
| 916 | 4190.06 | Equipment Maintenance & Repair | - | - | 4.06 | 20,768 | |
| 916 | 4190.07 | Membership Dues & Fees | - | - | 0.05 | 267 | |
| 916 | 4190.08 | Armored Car Service | - | - | - | - | |
| 916 | 4190.09 | Consulting Fees | - | - | - | - | |
| 916 | 4190.10 | Miscellaneous Sundry | 17.05 | 17.05 | 2.03 | 10,384 | |
| 916 | 4190.11 | Court Costs | - | - | 1.32 | 6,740 | |
| 916 | 4190.12 | Fiscal Agent Fees | - | - | - | - | |
| 916 | 4190.13 | Data Processing | - | - | - | - | |
| 916 | 4190.14 | Office Equipment Purchases <\$500 | - | - | - | - | |
| 916 | 4190.17 | Temporary Labor | - | - | - | - | |
| 916 | 4190.18 | Reproduction | - | - | - | - | |
| 916 | 4190.19 | Sundry | - | - | - | - | |
| 916 | 4190.20 | Drug Testing | - | - | - | - | |
| 916 | 4190.21 | Administrative Fees | - | - | - | - | |
| 916 | 4190.00 | Sundry Administrative | 24.51 | 24.78 | 22.73 | 116,191 | |
| 913 | | Asset Management Fee | - | - | 75.68 | 386,876 | \$58.18 + \$7.50 + \$10.00 x AUM |
| | | Total Administrative Expense | 143.27 | 137.73 | 148.01 | 756,634 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 426

AMP 3

MA 1-3, 1-4

Total Salaries & Benefits \$ 879,125

Department

Total Other \$ 2,158,816

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|---|-------------|--|----------------|----------------|----------------|------------------|--------------|
| TENANT SERVICES | | | | | | | |
| 921 | 4210.00 | Salaries - Reg. | 5.20 | 5.32 | 5.38 | 27,500 | |
| 921 | 4210.01 | Salaries - O.T. | - | - | - | | |
| 921 | 4210.00 | Total Tenant Services Salaries | 5.20 | 5.32 | 5.38 | 27,500 | |
| 923 | 4540.00 | Employee Benefit Contributions | 2.53 | 2.40 | 2.41 | 12,297 | |
| 924 | 4220.00 | Recreation & Publications | 3.70 | 3.05 | | | |
| 924 | 4230.00 | Contract Costs | 0.26 | 0.26 | - | | |
| 924 | | Total Non-Salary | 3.96 | 3.31 | - | - | |
| | | Total Tenant Services Expense | 11.69 | 11.03 | 7.79 | 39,797 | |
| UTILITIES | | | | | | | |
| 935 | 4355.01 | Labor - Reg. | - | | 8.12 | 41,500 | |
| 935 | 4355.02 | Labor - O.T. | - | - | - | | |
| 935 | 4355.00 | Total Utilities Labor | 7.62 | 7.81 | 8.12 | 41,500 | |
| 937 | 4540.00 | Employee Benefit Contributions | 3.71 | 3.53 | 3.63 | 18,558 | |
| 931 | 4310.00 | Water (Includes Sewer Charges) | 34.55 | 33.47 | 33.47 | 171,095 | |
| 932 | 4320.00 | Electricity | 62.50 | 83.46 | 83.46 | 426,658 | |
| 933 | 4330.00 | Gas | 97.42 | 123.82 | 123.82 | 632,943 | |
| 938 | 4390.00 | Other | - | - | - | - | |
| | | Total Utility Expense | 205.80 | 252.09 | 252.49 | 1,290,754 | |
| ORDINARY MAINTENANCE & OPERATION | | | | | | | |
| 941 | 4410.00 | Labor - Reg. | 95.56 | 98.58 | 67.49 | 345,020 | |
| 941 | 4410.01 | Labor - O.T. | - | - | 3.81 | 19,500 | |
| 941 | 4410.00 | Total Maintenance Labor | 95.56 | 98.58 | 71.31 | 364,520 | |
| 942 | 4420.00 | Materials and Other | 21.58 | 20.82 | 27.39 | 140,000 | |
| 943 | 4430.01 | Auto Rentals & Repair | - | | | | |
| 943 | 4430.02 | Lock & Key Repair | - | | - | - | |
| 943 | 4430.03 | Electrical Repairs | - | - | - | - | |
| 943 | 4430.04 | Structural Repairs | - | - | 0.25 | 1,298 | |
| 943 | 4430.05 | Equipment Repairs & Rentals | - | | 0.88 | 4,500 | |
| 943 | 4430.06 | Repairs & Rentals | - | | - | - | |
| 943 | 4430.07 | Heating & AC Repairs | - | - | - | - | |
| 943 | 4430.08 | Elevator Maintenance | - | - | 6.99 | 35,750 | |
| 943 | 4430.09 | Heaters & Ranges | - | | - | - | |
| 943 | 4430.10 | Engineers & Consultants | - | - | - | - | |
| 943 | 4430.11 | Fire & Alarm Services | - | - | 0.78 | 4,010 | |
| 943 | 4430.14 | Licenses & Permits | - | | - | - | |
| 943 | 4430.15 | Auto Allowances | - | - | - | - | |
| 943 | 4430.16 | Garbage Truck Repairs | - | - | - | - | |
| 943 | 4430.17 | Sewage & Plumbing | - | - | - | - | |
| 943 | 4430.18 | Paving & Fencing | - | - | - | - | |
| 943 | 4430.19 | Grass Cutting | - | - | - | - | |
| 943 | 4430.20 | Other Contract Costs | 25.90 | 28.23 | 1.52 | 7,788 | |
| 943 | 4430.22 | Garbage Collection | - | | 8.94 | 45,676 | |
| 943 | 4430.23 | Tree Removal | - | | - | - | |
| 943 | 4430.24 | Pest Control | - | - | 3.80 | 19,448 | |
| 943 | 4430.25 | Uniforms | - | | 0.10 | 519 | |
| 943 | 4430.26 | Work Tasks | - | - | - | - | |
| 943 | | Total Contract Costs | 25.90 | 28.23 | 23.28 | 118,989 | |
| 945 | 4540.00 | Employee Benefit Contributions | 46.54 | 44.50 | 31.89 | 163,002 | |
| | | Total Ordinary Maintenance & Operation | 189.58 | 192.13 | 153.86 | 786,511 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING
September 30, 2008

Total Units 426

AMP 3

MA 1-3, 1-4

Total Salaries & Benefits \$ 879,125

Department

Total Other \$ 2,158,816

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|-------------------------------------|-------------|--|----------------|----------------|----------------|------------------|--------------------------|
| PROTECTIVE SERVICES | | | | | | | |
| 951 | 4465.01 | Labor | | - | | | |
| 951 | 4465.02 | Labor - O.T. | | - | - | | |
| 951 | 4465.00 | Total Protective Services Labor | | - | | | |
| 952 | 4480.00 | Contract Costs | - | - | | | |
| 955 | 4540.00 | Employee Benefit Contributions | | - | - | | |
| | | Total Protective Services | - | | | | |
| GENERAL | | | | | | | |
| 961 | 4510.01 | Insurance - General Coverage | 24.64 | 24.66 | 1.83 | 9,344 | |
| 961 | 4510.02 | Workmans Compensation | - | | 3.64 | 18,618 | |
| 961 | 4510.03 | Self Insurance - Liability | - | | 8.31 | 42,461 | |
| 961 | 4510.04 | Self Insurance - Fire | - | - | 9.05 | 46,279 | |
| 961 | | Total Insurance | 24.64 | 24.66 | 22.83 | 116,702 | |
| 963 | 4520.00 | Payments in Lieu of Taxes | 7.62 | 8.38 | 2.14 | 10,925 | HUD formula - form 52267 |
| 964 | 4570.00 | Collection Losses | 2.54 | 2.54 | | | |
| 967 | 4580.00 | Interest Expense | - | | | | |
| 968 | 4530.00 | Terminal Leave | 2.54 | 1.52 | - | | |
| | | Total General Expenses | 37.34 | 37.10 | 24.97 | 127,626 | |
| TOTAL ROUTINE EXPENDITURES | | | | | | | |
| 969 | | Total Routine Operating Expense | 587.68 | 630.08 | 587.11 | 3,001,321 | |
| 970 | | Excess Operating Revenue over Operating Expenses | 14.47 | 287,093.44 | 57.69 | 294,909 | |
| NON-ROUTINE EXPENDITURES | | | | | | | |
| 971 | 4610.00 | Extraordinary Maintenance | 11.68 | 4.57 | 6.85 | 35,000 | |
| | | Capital Needs | 4.35 | 3.16 | 0.32 | 1,620 | |
| | | Total Non-Routine Expenses | 16.03 | 7.73 | 7.16 | 36,620 | |
| RESIDUAL RECEIPTS OR DEFICIT | | | | | | | |
| 900 | | Total Expenses | 603.71 | 637.81 | 594.28 | 3,037,941 | |
| | | Excess Operating Revenue over Operating Expenses | (1.56) | 22.20 | 50.53 | 258,289 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING 12/31/06

Total Units 391

AMP 4

MA 1-5, 1-6, 1-11

Total Salaries & Benefits \$ 885,122

Department

Total Other \$ 1,988,089

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------|-------------|-----------------------------------|----------------|----------------|----------------|------------------|--------------|
| REVENUES | | | | | | | |
| 703 | 3110.00 | Dwelling Rental Income | 277.27 | 287.02 | 282.82 | 1,327,000 | |
| 704 | 3120.00 | Excess Utilities | - | - | - | - | |
| 704 | 3692.00 | Tenant Revenue - Other | - | - | - | - | |
| 704 | | Total Tenant Revenue Other | - | - | - | - | |
| 705 | | Total Tenant Revenue | 277.27 | 287.02 | 282.82 | 1,327,000 | |
| 706 | 8020.00 | Current Year Operating Subsidy | 298.97 | 337.19 | 348.31 | 1,634,265 | |
| 711 | 3610.00 | Investment Income - Unrestricted | 2.29 | 3.81 | 4.98 | 23,353 | |
| 720 | 3431.00 | Investment Income - Restricted | - | - | - | - | |
| 715 | 3190.00 | Section 8 Rental Income | - | - | - | - | |
| 715 | 3690.00 | Other Revenue | 10.92 | 10.92 | 7.62 | 35,745 | |
| 715 | 3690.15 | Admin Fee | - | - | - | - | |
| 715 | | Total Other Revenue | 10.92 | 10.92 | 7.62 | 35,745 | |
| 716 | 6120.00 | Gain/(Loss) on Equipment Disposal | - | - | - | - | |
| 1001 | 9110.00 | Operating Transfers - In | 12.70 | 21.07 | 10.03 | 47,080 | |
| | | Capital Grant Allocation | - | - | - | - | |
| | | Other Grant Allocation | - | - | - | - | |
| | | Section 8 Allocation | - | - | - | - | |
| 700 | | Total Revenue | 602.15 | 660.01 | 653.76 | 3,067,443 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING 12/31/06

Total Units 391

AMP 4

MA 1-5, 1-6, 1-11

Total Salaries & Benefits \$ 885,122

Department

Total Other \$ 1,988,089

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|--------------------------------|-------------|--|----------------|----------------|----------------|------------------|----------------------------------|
| ADMINISTRATIVE EXPENSES | | | | | | | |
| 911 | 4110.00 | Salaries - Reg. | 79.62 | 77.57 | 36.59 | 171,703 | |
| 911 | 4110.01 | Salaries - O.T. | - | - | 0.91 | 4,289 | |
| 911 | 4110.00 | Total Administrative Salaries | 79.62 | 77.57 | 37.51 | 175,991 | |
| 912 | 4171.00 | Auditing Fees | 0.36 | 0.36 | 0.36 | 1,668 | |
| 915 | 4540.00 | Employee Benefit Contributions - Admin | 38.78 | 35.02 | 16.77 | 78,698 | |
| 916 | 4130.00 | Legal | 5.08 | 5.08 | 5.08 | 23,827 | |
| 916 | 4140.00 | Staff Training | 1.02 | 1.27 | 0.97 | 4,537 | |
| 916 | 4150.00 | Travel / Parking | 1.04 | 1.04 | 1.05 | 4,915 | |
| 916 | 4170.00 | Accounting Fees | 0.32 | 0.34 | 0.84 | 3,955 | |
| 916 | 4190.01 | Stationary / Supplies | - | - | 3.14 | 14,713 | |
| 916 | 4190.02 | Telephone | - | - | 4.06 | 19,062 | |
| 916 | 4190.04 | Advertisement | - | - | - | - | |
| 916 | 4190.05 | Publications | - | - | 0.13 | 613 | |
| 916 | 4190.06 | Equipment Maintenance & Repair | - | - | 4.06 | 19,062 | |
| 916 | 4190.07 | Membership Dues & Fees | - | - | 0.05 | 245 | |
| 916 | 4190.08 | Armored Car Service | - | - | - | - | |
| 916 | 4190.09 | Consulting Fees | - | - | - | - | |
| 916 | 4190.10 | Miscellaneous Sundry | 17.05 | 17.05 | 2.03 | 9,531 | |
| 916 | 4190.11 | Court Costs | - | - | 1.32 | 6,186 | |
| 916 | 4190.12 | Fiscal Agent Fees | - | - | - | - | |
| 916 | 4190.13 | Data Processing | - | - | - | - | |
| 916 | 4190.14 | Office Equipment Purchases <\$500 | - | - | - | - | |
| 916 | 4190.17 | Temporary Labor | - | - | - | - | |
| 916 | 4190.18 | Reproduction | - | - | - | - | |
| 916 | 4190.19 | Sundry | - | - | - | - | |
| 916 | 4190.20 | Drug Testing | - | - | - | - | |
| 916 | 4190.21 | Administrative Fees | - | - | - | - | |
| 916 | 4190.00 | Sundry Administrative | 24.51 | 24.78 | 22.73 | 106,645 | |
| 913 | | <i>Asset Management Fee</i> | - | - | 75.68 | 355,091 | \$58.18 + \$7.50 + \$10.00 x AUM |
| | | Total Administrative Expense | 143.27 | 137.73 | 153.05 | 718,093 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING 12/31/06

Total Units 391

AMP 4

MA 1-5, 1-6, 1-11

Total Salaries & Benefits \$ 885,122

Department

Total Other \$ 1,988,089

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|---|-------------|--|----------------|----------------|----------------|------------------|--------------|
| TENANT SERVICES | | | | | | | |
| 921 | 4210.00 | Salaries - Reg. | 5.20 | 5.32 | 5.33 | 25,000 | |
| 921 | 4210.01 | Salaries - O.T. | - | - | - | | |
| 921 | 4210.00 | Total Tenant Services Salaries | 5.20 | 5.32 | 5.33 | 25,000 | |
| 923 | 4540.00 | Employee Benefit Contributions | 2.53 | 2.40 | 2.38 | 11,179 | |
| 924 | 4220.00 | Recreation & Publications | 3.70 | 3.05 | | | |
| 924 | 4230.00 | Contract Costs | 0.26 | 0.26 | - | | |
| 924 | | Total Non-Salary | 3.96 | 3.31 | - | - | |
| | | Total Tenant Services Expense | 11.69 | 11.03 | 7.71 | 36,179 | |
| UTILITIES | | | | | | | |
| 935 | 4355.01 | Labor - Reg. | - | | 8.10 | 38,000 | |
| 935 | 4355.02 | Labor - O.T. | - | - | - | | |
| 935 | 4355.00 | Total Utilities Labor | 7.62 | 7.81 | 8.10 | 38,000 | |
| 937 | 4540.00 | Employee Benefit Contributions | 3.71 | 3.53 | 3.62 | 16,992 | |
| 931 | 4310.00 | Water (Includes Sewer Charges) | 34.55 | 33.47 | 33.47 | 157,038 | |
| 932 | 4320.00 | Electricity | 62.50 | 83.46 | 83.46 | 391,604 | |
| 933 | 4330.00 | Gas | 97.42 | 123.82 | 123.82 | 580,941 | |
| 938 | 4390.00 | Other | - | - | - | - | |
| | | Total Utility Expense | 205.80 | 252.09 | 252.47 | 1,184,575 | |
| ORDINARY MAINTENANCE & OPERATION | | | | | | | |
| 941 | 4410.00 | Labor - Reg. | 95.56 | 98.58 | 75.60 | 354,734 | |
| 941 | 4410.01 | Labor - O.T. | - | - | 3.81 | 17,898 | |
| 941 | 4410.00 | Total Maintenance Labor | 95.56 | 98.58 | 79.42 | 372,632 | |
| 942 | 4420.00 | Materials and Other | 21.58 | 20.82 | 25.15 | 118,000 | |
| 943 | 4430.01 | Auto Rentals & Repair | - | | | | |
| 943 | 4430.02 | Lock & Key Repair | - | - | | | |
| 943 | 4430.03 | Electrical Repairs | - | - | | | |
| 943 | 4430.04 | Structural Repairs | - | | 0.25 | 1,191 | |
| 943 | 4430.05 | Equipment Repairs & Rentals | - | | 0.16 | 731 | |
| 943 | 4430.06 | Repairs & Rentals | - | - | | | |
| 943 | 4430.07 | Heating & AC Repairs | - | | 0.81 | 3,800 | |
| 943 | 4430.08 | Elevator Maintenance | - | | 3.46 | 16,250 | |
| 943 | 4430.09 | Heaters & Ranges | - | - | | | |
| 943 | 4430.10 | Engineers & Consultants | - | - | | | |
| 943 | 4430.11 | Fire & Alarm Services | - | | 0.96 | 4,510 | |
| 943 | 4430.14 | Licenses & Permits | - | - | | | |
| 943 | 4430.15 | Auto Allowances | - | - | | | |
| 943 | 4430.16 | Garbage Truck Repairs | - | - | | | |
| 943 | 4430.17 | Sewage & Plumbing | - | - | | | |
| 943 | 4430.18 | Paving & Fencing | - | - | | | |
| 943 | 4430.19 | Grass Cutting | - | - | | | |
| 943 | 4430.20 | Other Contract Costs | 25.90 | 28.23 | 1.52 | 7,148 | |
| 943 | 4430.22 | Garbage Collection | - | | 5.89 | 27,632 | |
| 943 | 4430.23 | Tree Removal | - | - | | | |
| 943 | 4430.24 | Pest Control | - | | 5.07 | 23,768 | |
| 943 | 4430.25 | Uniforms | - | | 0.10 | 477 | |
| 943 | 4430.26 | Work Tasks | - | - | - | - | |
| 943 | | Total Contract Costs | 25.90 | 28.23 | 18.22 | 85,507 | |
| 945 | 4540.00 | Employee Benefit Contributions | 46.54 | 44.50 | 35.51 | 166,629 | |
| | | Total Ordinary Maintenance & Operation | 189.58 | 192.13 | 158.31 | 742,768 | |

Lowell Housing Authority
ANNUAL OPERATING BUDGET FOR FISCAL YEAR ENDING 12/31/06

Total Units 391

AMP 4

MA 1-5, 1-6, 1-11

Total Salaries & Benefits \$ 885,122

Department

Total Other \$ 1,988,089

| A FDS Line # | B Acct # | C Account Description | E FY 06 PUM | F FY 07 PUM | G FY 08 PUM | H FY08 Budget | J Remarks |
|-------------------------------------|-------------|--|----------------|----------------|----------------|------------------|--------------------------|
| PROTECTIVE SERVICES | | | | | | | |
| 951 | 4465.01 | Labor | | - | | | |
| 951 | 4465.02 | Labor - O.T. | | - | - | | |
| 951 | 4465.00 | Total Protective Services Labor | | - | - | | |
| 952 | 4480.00 | Contract Costs | - | - | | | |
| 955 | 4540.00 | Employee Benefit Contributions | | - | - | | |
| | | Total Protective Services | - | - | - | | |
| GENERAL | | | | | | | |
| 961 | 4510.01 | Insurance - General Coverage | 24.64 | 24.66 | 1.83 | 8,576 | |
| 961 | 4510.02 | Workmans Compensation | - | | 3.64 | 17,088 | |
| 961 | 4510.03 | Self Insurance - Liability | - | | 8.31 | 38,972 | |
| 961 | 4510.04 | Self Insurance - Fire | - | - | 9.05 | 42,477 | |
| 961 | | Total Insurance | 24.64 | 24.66 | 22.83 | 107,113 | |
| 963 | 4520.00 | Payments in Lieu of Taxes | 7.62 | 8.38 | 3.04 | 14,243 | HUD formula - form 52267 |
| 964 | 4570.00 | Collection Losses | 2.54 | 2.54 | | | |
| 967 | 4580.00 | Interest Expense | - | - | | | |
| 968 | 4530.00 | Terminal Leave | 2.54 | 1.52 | - | | |
| | | Total General Expenses | 37.34 | 37.10 | 25.86 | 121,356 | |
| TOTAL ROUTINE EXPENDITURES | | | | | | | |
| 969 | | Total Routine Operating Expense | 587.68 | 630.08 | 597.39 | 2,802,971 | |
| 970 | | Excess Operating Revenue over Operating Expenses | 14.47 | 287,093.44 | 56.37 | 264,472 | |
| NON-ROUTINE EXPENDITURES | | | | | | | |
| 971 | 4610.00 | Extraordinary Maintenance | 11.68 | 4.57 | 6.39 | 30,000 | |
| | | Capital Needs | 4.35 | 3.16 | 8.58 | 40,240 | |
| | | Total Non-Routine Expenses | 16.03 | 7.73 | 14.97 | 70,240 | |
| RESIDUAL RECEIPTS OR DEFICIT | | | | | | | |
| 900 | | Total Expenses | 603.71 | 637.81 | 612.36 | 2,873,211 | |
| | | Excess Operating Revenue over Operating Expenses | (1.56) | 22.20 | 41.40 | 194,232 | |

| AMP | Units | Percent |
|-------|-------|---------|
| 1 | 524 | 31.93% |
| 2 | 300 | 18.28% |
| 3 | 426 | 25.96% |
| 4 | 391 | 23.83% |
| Total | 1641 | 100.00% |

Page 1

Cost Center **HUD MA001-C**

[illegible]

Lowell Housing Authority
Schedule of Materials and Supplies
September 30, 2008

| | | |
|-------|--------------|----------------|
| AMP | <u>Units</u> | <u>Percent</u> |
| 1 | 524 | 31.93% |
| 2 | 300 | 18.28% |
| 3 | 426 | 25.96% |
| 4 | 391 | 23.83% |
| Total | 1641 | 100.00% |

Cost Center **HUD MA001-C**

| Vendor Name | Service Type | MA001 TOTAL | AMP 1 | AMP 2 | AMP 3 | AMP 4 |
|--------------------|--|----------------|----------------|----------------|----------------|----------------|
| | MATERIALS AND SUPPLIES | 448,000 | 110,000 | 80,000 | 140,000 | 118,000 |
| SEE COCC SCHEDULES | | | | | | |
| | CONTRACT COSTS | | | | | |
| | Auto Rentals & Repair | - | - | - | - | - |
| | Lock & Key Repair | - | - | - | - | - |
| | Electrical Repairs | - | - | - | - | - |
| PRORATE | Structural Repairs | 5,000 | 1,597 | 914 | 1,298 | 1,191 |
| DIRECT | Equipment Repairs & Rentals | 5,231 | | | 4,500 | 731 |
| | Repairs & Rentals | - | - | - | - | - |
| DIRECT | Heating & AC Repairs | 4,600 | 300 | 500 | - | 3,800 |
| DIRECT | Elevator Maintenance | 52,000 | - | - | 35,750 | 16,250 |
| | Heaters & Ranges | - | - | - | - | - |
| | Engineers & Consultants | - | - | - | - | - |
| DIRECT | Fire & Alarm Services | 12,510 | 3,045 | 945 | 4,010 | 4,510 |
| | Licenses & Permits | - | - | - | - | - |
| | Auto Allowances | - | - | - | - | - |
| | Garbage Truck Repairs | - | - | - | - | - |
| | Sewage & Plumbing | - | - | - | - | - |
| | Paving & Fencing | - | - | - | - | - |
| | Grass Cutting | - | - | - | - | - |
| PRORATE | Other Contract Costs | 30,000 | 9,580 | 5,484 | 7,788 | 7,148 |
| DIRECT | Garbage Collection | 175,907 | 72,371 | 30,228 | 45,676 | 27,632 |
| | Tree Removal | - | - | - | - | - |
| DIRECT | Pest Control | 112,913 | 38,996 | 30,701 | 19,448 | 23,768 |
| PRORATE | Uniforms | 2,000 | 639 | 366 | 519 | 477 |
| | Work Tasks | - | | | | |
| | Total Contract Costs | 400,161 | 126,527 | 69,138 | 118,989 | 85,507 |
| | | | | | | |
| | Grand Total Materials and Contracts | 848,161 | 236,527 | 149,138 | 258,989 | 203,507 |

Cost Center

| <u>AMP</u> | <u>Units</u> | <u>Percent</u> |
|------------|--------------|----------------|
| 1 | 524 | 31.93% |
| 2 | 300 | 18.28% |
| 3 | 426 | 25.96% |
| 4 | 391 | 23.83% |
| Total | 1641 | 100.00% |

Lowell Housing Authority
Budget Worksheet - Account 4540
Employee Benefit Contributions

Cost Center

HUD MA001-C

| Department | AMP | Total Salaries | % | Total Benefits | Allocated Amt. |
|-------------------|------------|-----------------------|----------|-----------------------|-----------------------|
| Admin | AMP 1 | \$ 170,234 | 6.7% | | \$ 76,123 |
| Admin | AMP 2 | 170,866 | 6.8% | | \$ 76,406 |
| Admin | AMP 3 | 173,960 | 6.9% | | \$ 77,789 |
| Admin | AMP 4 | 175,991 | 7.0% | | \$ 78,698 |
| | | | | | |
| Tenant Services | AMP 1 | 33,500 | 1.3% | | \$ 14,980 |
| Tenant Services | AMP 2 | 19,000 | 0.8% | | \$ 8,496 |
| Tenant Services | AMP 3 | 27,500 | 1.1% | | \$ 12,297 |
| Tenant Services | AMP 4 | 25,000 | 1.0% | | \$ 11,179 |
| | | | | | |
| Utilities | AMP 1 | 51,000 | 2.0% | | \$ 22,806 |
| Utilities | AMP 2 | 29,500 | 1.2% | | \$ 13,191 |
| Utilities | AMP 3 | 41,500 | 1.6% | | \$ 18,558 |
| Utilities | AMP 4 | 38,000 | 1.5% | | \$ 16,992 |
| | | | | | |
| Maintenance | AMP 1 | 488,487 | 19.3% | | \$ 218,436 |
| Maintenance | AMP 2 | 349,660 | 13.8% | | \$ 156,357 |
| Maintenance | AMP 3 | 364,520 | 14.4% | | \$ 163,002 |
| Maintenance | AMP 4 | 372,632 | 14.7% | | \$ 166,629 |
| | | | | | |
| | | | | | |
| Totals | | \$ 2,531,349 | | \$ 1,131,941 | \$ 1,131,941 |

Lowell Housing Authority
Schedule of Extraordinary Maintenance and Equipment Replacement
September 30, 2008

| AMP | Units | Percent |
|--------------|-------------|----------------|
| 1 | 524 | 31.93% |
| 2 | 300 | 18.28% |
| 3 | 426 | 25.96% |
| 4 | 391 | 23.83% |
| Total | 1641 | 100.00% |

Cost Center HUD MA001-C

| Description | Price Per Item | MA001 TOTAL | AMP 1 | AMP 2 | AMP 3 | AMP 4 |
|--|----------------|-------------|--------|--------|--------|--------|
| EXTRAORDINARY MAINTENANCE | | | | | | |
| Paint Occupied Units | | 75,000 | 20,000 | 10,000 | 25,000 | 20,000 |
| Paint Common Areas (Exterior and Interior) | | 40,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| TOTAL | | 115,000 | 30,000 | 20,000 | 35,000 | 30,000 |
| REPLACEMENT OF EQUIPMENT | | | | | | |
| Lawn Equipment | | 4,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| Snow Blowers | | 2,800 | 2,800 | | | |
| Power Sweepers | | 1,860 | | | 620 | 1,240 |
| | | - | | | | |
| | | - | | | | |
| TOTAL | | 8,660 | 3,800 | 1,000 | 1,620 | 2,240 |
| BETTERMENTS AND ADDITIONS - CAPITAL | | | | | | |
| Trucks | | 76,000 | 38,000 | | | 38,000 |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| TOTAL | | 76,000 | 38,000 | - | - | 38,000 |
| GRAND TOTAL | | 199,660 | 71,800 | 21,000 | 36,620 | 70,240 |

Capital Fund Program Five-Year Action Plan

Part I: Summary

| PHA Name: Lowell Housing Authority | | | | (X) Original 5-Year Plan () Revision No: | |
|---|---------------------|--|--|--|--|
| Development Number/Name/ HA-Wide | Year 1 2008 | Work Statement for Year 2 FFY Grant: 2009 PHA FY: 2010 | Work Statement for Year 3 FFY Grant: 2010 PHA FY: 2011 | Work Statement for Year 4 FFY Grant: 2011 PHA FY: 2012 | Work Statement for Year 5 FFY Grant: 2012 PHA FY: 2013 |
| North Common Village MA 1-1 AMP 1 | Annual Statement | \$0 | \$500,000 | \$400,000 | \$1,025,000 |
| George W. Flanagan MA 1-2 AMP 2 | | \$397,942 | \$638,383 | \$0 | \$500,000 |
| Bishop Markham Village MA 1-3 AMP 3 | | \$1,635,527 | \$400,000 | \$400,000 | \$197,500 |
| Faulkner Street Development MA 1-4 AMP 3 | | \$0 | \$0 | \$0 | \$112,500 |
| Fr. Norton Manor MA 1-5 AMP 4 | | \$0 | \$0 | \$0 | \$16,667 |
| Dweyey Archambault Towers MA 1-6 AMP 4 | | \$0 | \$0 | \$0 | \$16,666 |
| Harold Hartwell Court MA 1-7 AMP 2 | | \$0 | \$0 | \$0 | \$25,000 |
| Francis Gatehouse Mill MA 1-11 AMP 4 | | \$0 | \$0 | \$500,000 | \$76,667 |
| Scattered Sites MA 1-12 AMP 2 | | \$100,000 | \$72,642 | \$22,642 | \$25,000 |
| Scattered Sites MA 1-14 AMP 2 | | \$100,000 | \$100,000 | \$50,000 | \$25,000 |
| Replacement Housing MA 1-17 AMP 2 | | \$0 | \$0 | \$0 | \$25,000 |
| MA 1-18 AMP 1 | | \$0 | \$0 | \$0 | \$0 |
| HA-Wide | | \$745,448 | \$1,267,892 | \$1,606,275 | \$933,917 |
| CFP Fund Listed for 5-year Planning | | \$2,978,917 | \$2,978,917 | \$2,978,917 | \$2,978,917 |
| Replacements Housing Factor Funds | | | | | |
| TOTAL: | | \$2,978,917 | \$2,978,917 | \$2,978,917 | \$2,978,917 |

**Capital Fund Program Five-Year Action Plan
Part II: Supporting Page - Page 1 - Work Activities**

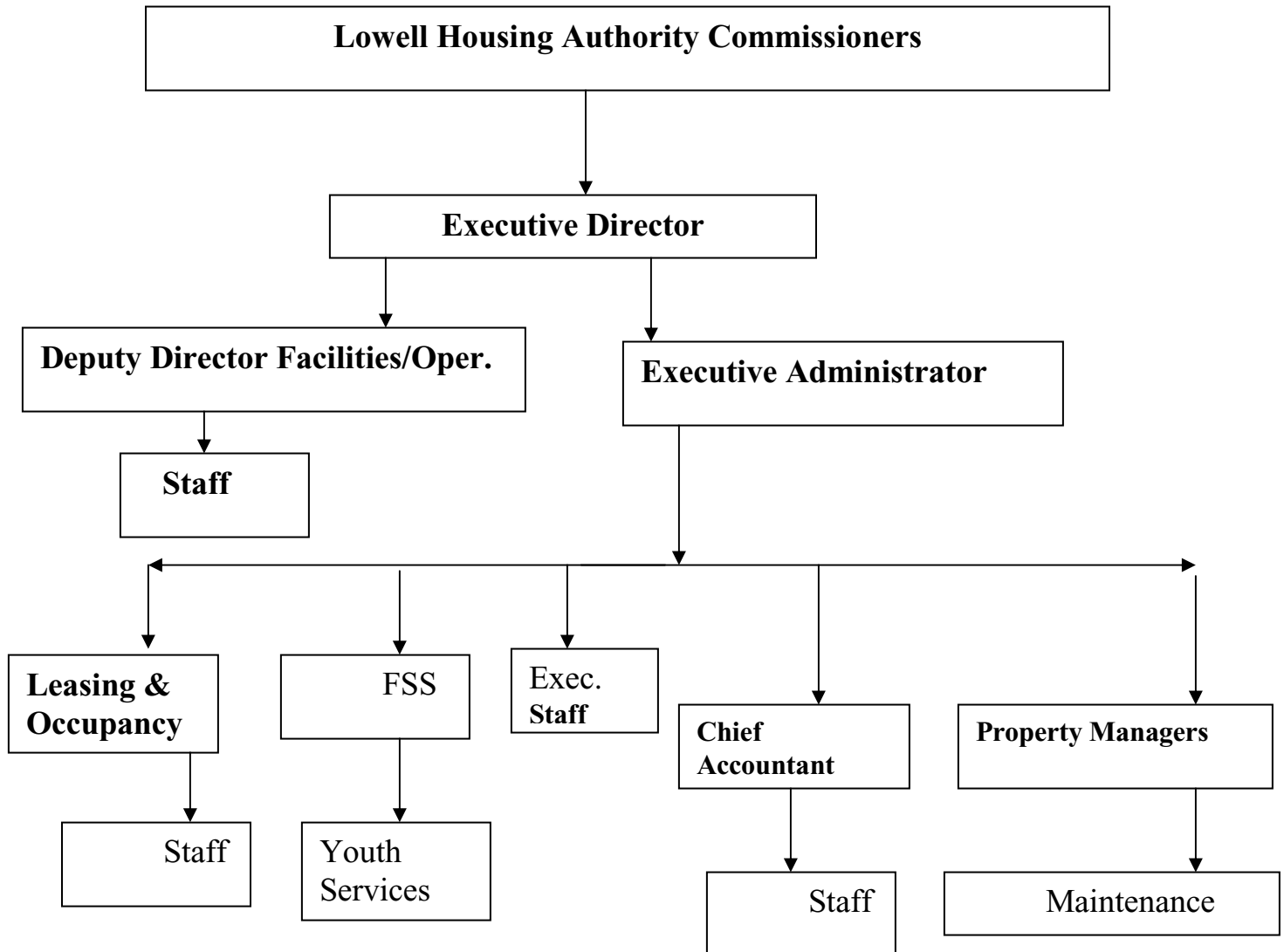
| Activities for Year 1 2008 | | Activities for Year FFY Grant:2009 PHA FY: 2010 | | Activities for Year FFY Grant: 2010 PHA FY: 2011 | | | |
|-------------------------------------|------------------------------------|---|-------------------------------------|--|---------------------------------|----------------|-------------|
| | Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost | |
| See Annual Statement | George Flanagan MA 1-2 | Kitchens & Baths 1460 | \$397,942 | George Flanagan MA 1-2 | Kitchen & Baths 1460 | \$638,383 | |
| | Bishop Markham Village - MA 1-3 | Windows Kitchens & Baths 1460 | \$705,000 \$930,527 | Bishop Markham Village - MA 1-3 | Elevator Up-Grade 1470 | \$400,000 | |
| | Scattered Sites MA 1-12 | Unit Rehab 1460 | \$100,000 | Scattered Sites MA 1-12 | Unit Rehab 1460 | \$72,642 | |
| | Scattered Sites MA 1-14 | Unit Rehab 1460 | \$100,000 | Scattered Sites MA 1-14 | Unit Rehab 1460 | \$100,000 | |
| | | | \$0 | North Common Village - MA 1-1 | Window Replacement 14060 | \$500,000 | |
| | | | \$0 | | | | |
| | HA-WIDE | 1408/Management Improvements | \$125,000 | HA-Wide | 1408/Management Improvements | | \$300,000 |
| | | 1410/Administration | \$297,892 | | 1410/Administration | | \$297,892 |
| | | 1430/Fees & Costs | \$50,000 | | 1430/Fees & Costs | | \$175,000 |
| | | 1450/Site Improvements | \$213,382 | | 1450/Site Improvements | | \$375,000 |
| 1495.1/Relocation | | \$19,174 | 1495.1/Relocation | | | \$5,000 | |
| 1460/Non-Routine PM Repairs | | \$5,000 | 1460/Non-Routine PM Repairs | | | \$5,000 | |
| 1460/Non-Routine Vacancy Repairs | | \$5,000 | 1460/Non-Routine Vacancy Repairs | | | \$5,000 | |
| 1406/Operations | | \$25,000 | 1406/Operations | | | \$100,000 | |
| 1465.1/Dwelling Equipment | | \$5,000 | 1465.1/Dwelling Equipment | | | \$5,000 | |
| Total CFP Estimated Cost | | | \$2,978,917 | | Total CFP Estimated Cost | | \$2,978,917 |

Capital Fund Program Five-Year Action Plan

Part II: Supporting Page - Page 2 - Work Activities

| Activities for Year Year 1 2008 | | | Activities for Year FFY Grant: 2011 PHA FY: 2012 | | Activities for Year FFY Grant: 2012 PHA FY: 2013 | | |
|---------------------------------------|----------------------------------|---|--|---|--|----------------|----------|
| | Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost | |
| See Annual Statement | North Common Village - MA 1-1 | Kitchen & Baths 1460 | \$400,000 | AMP 1 MA 1-1, 1-18 Fletcher Street | Site Imp. 1450 | \$200,000 | |
| | Scattered Sites MA 1-12 | Common Areas & Unit Rehab 1460 &1470 | \$22,642 | | Unit Rehab 1460 1-1 | \$600,000 | |
| | Scattered Sites MA 1-14 | Common Areas & Unit Rehab 1460 & 1470 | \$50,000 | | Roof Repairs 1460 1-1 | \$125,000 | |
| | Francis Gatehouse MA 1-11 | Kitchen & Baths 1460 | \$500,000 | | Unit Conversion 1460 MA 1-1 | \$100,000 | |
| | Bishop Markham MA 1-3 | Elevator Up-grades 1475 | \$400,000 | AMP 2 MA 1-2, 1-7, 1-12, 1-14, 1-17 | Site Imp. 1450 | \$125,000 | |
| | | | | | Storm Doors 1460 1-2 | \$125,000 | |
| | | | | | Unit Rehab 1460 1-2 | \$250,000 | |
| | | | | | Transformers 1460 1-2 | \$100,000 | |
| | | | | | Siding on Building | \$200,000 | |
| | | | | | AMP 3 MA 1-3 & 1-4 | Site Imp. 1450 | \$25,000 |
| | | | | Windows 1-3 1460 | \$185,000 | | |
| | | | | Windows 1-4 1460 | \$100,000 | | |
| | | | | AMP 4 MA 1-5, 1-6, 1-11 | Site Imp. 1450 | \$50,000 | |
| | | | | Carpets 1-11 1460 | \$60,000 | | |
| | HA-Wide | 1408/Management Improvements | \$250,000 | HA-Wide | 1408/Management Improvements | \$250,000 | |
| | | 1410/Administration | \$297,892 | | 1410/Aministration | \$297,892 | |
| | | 1430/Fees & Costs | \$200,000 | | 1430/Fees & Costs | \$125,000 | |
| | | 1450/Site Improvements | \$338,383 | | 1450/Site Improvements | | |
| | | 1495.1/Relocation | \$10,000 | | 1495.1/Relocation | | |
| | | 1460/Non-Routine PM Repairs | \$5,000 | | 1460/Non Routine PM Repairs | \$5,000 | |
| | | 1460/Non-Routine Vacancy Repairs | \$5,000 | | 1460/Non Routine Vacancy Repairs | \$5,000 | |
| | | 1406/Operations | \$400,000 | | 1406/Operations | \$26,025 | |
| | | 1465.1/Dwelling Equipment | \$100,000 | | 1499 Develop.Act. | \$25,000 | |
| | | | | | 1475 NonDwell Equip | \$200,000 | |
| | | | | | | | |
| | | | | | | | |
| Ttotal CFP Estimated Cost | | | \$2,978,917 | Total CFP Estimated Cost | | \$2,978,917 | |

Attachment G: Lowell Housing Authority Staffing Information and Organizational Chart



**Executive Department: 350 Moody Street, Lowell
Administrative Office**

Gary K. Wallace, Executive Director

Maryann Maciejewski, Executive Administrator

Marlene A. Browne, Employee Development and Training Manager

James Hayes, Information Tech. Support Specialist

Judi Beilen, Procurement and Inventory Control Officer

Maria Rodriguez, Executive Secretary

Charles Kanavas, Central Supply Manager, Central Storage, 39 Quimby Ave.

Lal Israni, Accountant/Energy Conservation Officer
Gerald Moore, Chief Accountant
Carol Martin, Clerk/Payroll-Voucher Program
Brenda O'Keefe, Clerk/Accounts Payable-Secretary
William Sheehan, Division Director/Conventional Housing Programs
Ellen Kotzias, PHA Technician/Secretary

Public and Leased Housing (L&O office) 285 Salem Street

Tha Chhan, Division Director/Leased Housing Programs
Arlene McDermott, Assistant Division Director/L&O
Mark Briere, Administrative Aide/Office Coordinator
Tracy Carbonneau, Administrative Aide
Mary Carmichael, Clerk/Data Processing Technician
Kathy (Bunkhoeu) Fineberg, Administrative Aide
Lynn Flynn, PHA Technician
Richard Owens, Jr. PHA Technician

Brian Moriarty, Property Manager

Resident Management

Office location: North Common Village, 21 Salem St (Mass 1-1) Also Dublin St. (705)

Barbara O'Connor, Assistant Manager
Francisco Surillo, PHA Technician
Brian Dean, Mechanic (Lead)
James Donnelly, Mechanic
Todd Carr, Maintenance Technician
James Marcopoulos, Maintenance Technician
Brian Cassidy, Maintenance Technician
Gerry Lamphier, Custodian
Gerald Lutkus, Mechanic
Donald McGillicuddy, Custodian
Ronald Morrisette, Mechanic
Daniel Sadkowski, Mechanic

Dennis Mercier, Property Manager II

**Office location: G.W. Flanagan Development 580 Chelmsford St. (Mass 1-2)
Also (1-12, 1-14 scattered sites) and Temple St. Mass 1-7**

Mary Gail Lynch, Assistant Housing Manager
Amy Dalton, PHA Technician
Cheryl Calvertinos, Mechanic (Lead)
Gary Flynn, Custodian
Donald Genest, Maintenance Technician
Raymond Reid, Mechanic

Leo Mason, Mechanic Aide/ Painter
George Campbell, Maintenance Technician
Conrad LeClair, Maintenance Technician
Michael Goyette, Maintenance Technician

Laurette McAneney, Property Manager

Office location: Bishop Markham Village 198 South St. (Mass 1-3)

Also (Faulkner St. 1-4)

Angelina Ramos, Assistant Housing Manager
Melissa Sinuon, PHA Technician
John Greenwood, Mechanic (Lead)
Brian Barter, Maintenance Technician
Gerald McGrade, Mechanic Aide/ Painter
Thomas King, Maintenance Technician
Eugene Finn, Custodian
Paul Slattery, Custodian
John Howarth, Maintenance Aide

Dolores Donnelly , Property Manager

Office location: Archambault Towers 350 Moody St. (Mass 1-6)

Also (Father Norton Manor, 117 & 137 High St., Mass 1-5, and Francis Gatehouse 735 Broadway St.,Mass 1-11, and 689 community residences)

Nanch Veira, Assistant Housing Manager
William Cassella, Mechanic (Lead)
Henry Babcock, Maintenance Technician (T)
Angel Torres, Maintenance Technician
Stanley McQuaid, Mechanic Aide/Painter
Barry Murphy, Maintenance Technician
Debbie Dowling, Custodian
Brian Berard, Maintenance Technician (T)
Tom Dolan, Custodian
Jared O'Neill, Custodian

Michael Glasheen , Property Manager II

Office location: Archie Kenefick Manor 50 Stackpole St. (667-2B)

Also Mass 1-12, Mass 1-4 scattered sites and Father Morrisette Manor on Hildreth St. and Lakeview Ave. (673)

Carmen Fernandez, Assistant Manager
Raynaud LaFontaine, Maintenance Technician
Chantha In, Maintenance Technician
Ivan Izquierdero, Custodian

Self-Sufficiency/Community Service/Supportive Services 21 Salem Street
Michelle Richter, FSS/Supportive Services Director
Susan Lucas, Case Manager THP (Grant)
Kevin Ahem, Manager/Planner - Homebuyer Program

Public Safety 21 Salem Street (Police Precinct)
Kevin Forsley, Office Manager/Dispatcher

Youth Services 21 Salem Street (Mercier Center)
Rey Serrano, Youth Services Program Director

Facilities Management Department 350 Moody Street

Administrative Office

William Duggan, Deputy Director of Facilities Management
Pamela Ryan, Exec. Sec. Facility Management Assistant
Brenda Chateauf, Administrative Assistant/Contracts

Facilities Management Department

Project Level Offices

Thomas Cashman, Coord. Facilities/Special Projects/Maint **39 Quimby Ave.**
Rene Chateauf, Facilities Coord/Heating Plumbing, A/C **Avenue C**
William Welch, Housing Quality Standards Technician **350 Moody Street**

Facilities Management Staff Positions/Union

Frank Stewart, Mechanic, Licensed Electrician
John LaRock, Mechanic/Licensed Plumber
Kevin Winn, Mechanic Aide/Heating
Steven Santos, Mechanic Aide/Heating
Bill LaBranche, Small Engine/ Auto Mechanic
Robert Lemire, Mech. Aide/ Heating

Attachment H: RAB Membership

PURPOSE: In response to the requirements of the Quality Housing and Work Responsibility Act of 1998 (QHWRA), the Lowell Housing Authority has established a Resident Advisory Board (RAB). The purpose of the Resident Advisory Board is to provide assistance to the housing authority in evaluating agency policies and the Agency Plan.

GUIDELINES: In drafting the Five Year Plan and the First Annual Plan in FY 2000, because the Lowell Housing Authority did not have an Authority-wide Tenant Council, it invited the Tenant Councils for each development to appoint representatives, the number for each being based on the size of the development. In addition, Housing Choice Voucher recipients were invited by a letter to all, to volunteer to serve on the RAB.

In all 32 members were selected. The RAB list for 2008 has been revised. In addition to the some of the same RAB members, new residents were invited to participate.

In addition, members are encouraged to meet separately with their respective Councils and other Voucher members who volunteer, between meetings of the RAB.

**Lowell Housing Authority
Lowell, Massachusetts**

Resident Advisory Board 2008

| Title | FirstName | LastName | Address1 | City | State | PostalCode | Program |
|---------------------------|------------------|------------------|---|---------------|--------------|-------------------|----------------|
| Ms. | Gladys | Aponte | 52 Avenue B Apt. #143 | Lowell | MA | 01851 | |
| Mr. | Alan | Bagley | 65 Summer Street Apt. #162 | Lowell | MA | 01852 | |
| Ms. | Dot | Baker | 50 Summer Street Apt. #98 | Lowell | MA | 01852 | LRPH |
| Ms. | Doris | Bonacci | 117 High Street Apt. #108W | Lowell | MA | 01852 | LRPH |
| Mr. & Mrs. | John | Burke | 604 Market Street #H314 | Lowell | MA | 01854 | LRPH |
| Ms. | Elsie | Burke | 735 Broadway Street Apt. #125 | Lowell | MA | 01854 | LRPH |
| Mr. | Raymond | Caunter | 137 High Street Apt. #403E | Lowell | MA | 01852 | |
| Ms. | Rita | Claypoole | 735 Broadway Street Apt. #314 | Lowell | MA | 01854 | LRPH |
| Ms. | Shirley | Connolly | 198 South St. Apt. #103 | Lowell | Ma | 01852 | |
| Ms. | Irene | Dokos | 735 Broadway Street Apt. #121 | Lowell | Ma | 01854 | |
| Ms. | Joan | Dube | 117 High Street Apt. #109-W | Lowell | MA | 01852 | |
| Mr. | Joe | Fardor | 117 High Street Apt. #106W | Lowell | MA | 01852 | |
| Ms. | Rita | Gaullin | 590 Market St. Apt. #323 | Lowell | MA | 01854 | |
| Ms. | Rita | Grady | 735 Broadway Street, Apt. #305 | Lowell | MA | 01854 | LRPH |
| Ms. | Irene | Harris | 198 South Street, Apt. | Lowell | MA | 01852 | |

| Title | FirstName | LastName | Address1 | City | State | PostalCode | Program |
|--------------|------------------|-----------------|-----------------|-------------|--------------|-------------------|----------------|
| | | | #4 | | | | |

| Title | FirstName | LastName | Address1 | City | State | PostalCode | Program |
|--------------|------------------|--------------------------|--|---------------|--------------|-------------------|----------------|
| Ms. | Jeannette | Hedlund | 657 Merrimack Street Apt. #738 | Lowell | MA | 01854 | LRPH |
| Mr. | John K | olofolias | 657 Merrimack Street, Apt. #111 | Lowell | MA | 01854 | LRPH |
| Ms. | Eleanor | Koravos | 117 High Street Apt. #107W | Lowell | MA | 01852 | |
| Ms. | Susan | Lucas | 15 Walker Place | Lowell | MA | 01854 | HCV |
| Mr. | William | McLaughlin | 137 High Street Apt. #408E | Lowell | MA | 01852 | |
| Ms. | Madeline | Morales | 65 Summer Street Apt. #163 | Lowell | MA | 01852 | LRPH |
| Mr. | Robert | Murphy | 14B Faulkner Street | Lowell | MA | 01852 | LRPH |
| Ms. | Fae | Roberts | 735 Broadway St. Apt. #201 | Lowell | MA | 01854 | |
| Ms. | Yamil | Roman | 37 O'Brien Terrace Apt. #486 | Lowell | MA | 01854 | LRPH |
| Mr. | William | Sheehan | 198 South Street Apt. #208 | Lowell | MA | 01852 | |
| Mr. | Angel | Vega | 408 Adams Street Apt. #128 | Lowell | MA | 01854 | LRPH |
| Ms. | Mary | Vinton | 137 High St. Apt. #402E | Lowell | Ma | 01852 | |
| Ms. | Lisa | Vonschliebe n | 657 Merrimack St. Apt. #336 | Lowell | MA | 01854 | |
| Ms. | Ann | Wallace | 735 Broadway St. Apt. #215 | Lowell | MA | 01854 | LRPH |
| Ms. | Sharyn | Whalen | 198 South Street Apt. | Lowell | MA | 01852 | LRPH |

| Title | FirstName | LastName | Address1 | City | State | PostalCode | Program |
|--------------|------------------|---------------------------|--|---------------|--------------|-------------------|----------------|
| | | | #H201 | | | | |
| Ms. | Donna | Whelan | 145 Gorahm Street Apt. #264 | Lowell | MA | 01852 | LRPH |
| Ms. | Rosaline | Willie- Bonglo | 21 Avenue C | Lowell | MA | 01851 | LRPH |

Attachment I: Comments of Resident Advisory Board

A Resident Advisory Board Meeting was held on February 19, 2008. The meeting opened at 1:00 p.m. Consultant Phillip Mayfield explained step by step the mission, goals, and strategy for addressing needs.

1. Resident Comments:

In attendance at these meetings were members of the RAB as well as LHA staff.

Residents from Francis Gatehouse stated that they are pleased with the elevator renovations/repairs that are scheduled to start shortly. They raised concern about installing a temporary handicap ramp on the basement floor. Bill Duggan will look into it.

Angel Vega, President of the North Common Village Tenant Council stated that Mr. Wallace contacted him to schedule a meeting to discuss the renovations at North Common Village. He is very happy with these renovations and look forward to the completion of the same.

2. Public Hearing

No comments were received.

Attachment J: Progress Report

Accomplishments of the Lowell Housing Authority in Year 3 (10/2007-9/2008)¹ of the Five Year PHA Plan (2005-2009)

LRPH Executive Operations

Summary:

Rental Integrity Monitoring System:

The Lowell Housing Authority continues to strive toward compliance with Rental Integrity Monitoring policies established by HUD. In March of 2007, HUD conducted a RIM Review for the Section 8 Housing Choice Voucher Program and Low Rent Public Housing Program. Several files were audited during this process and included samples from each federal housing development. The Agency proved successful, as there were no findings. We hope to continue our progress in this area by continuing to monitor files and provide additional training to all staff members.

Executive and Finance:

Despite an unpredictable economic environment, the authority was still able to demonstrate remarkable flexibility and adaptability in meeting the financial goals of the agency. Overall, the Authority remains in a strong financial position. Lowell was awarded a near perfect score of 28 out of 30 on the public housing assessment system's financial indicator for fiscal year ending 9/30/07. An authority-wide score of 94 out of 100 was achieved. The hard-working, professional employees of the Lowell Housing Authority are to credit for another successful year.

Low Rent Public Housing

Operating receipts totaled \$6,075,257, federal subsidies totaled \$6,462,955, and operating expenses totaled \$14,581,929 for a loss from operations of \$2,043,717. Occupancy levels remain at an exceptional 99% and tenant receivables continue to be kept at a minimum. Unrestricted net assets were \$2,619,790 at fiscal year end 9/30/07.

State Aided Programs

Operating receipts totaled \$744,661, state subsidies totaled \$1,362,308, and operating expenses totaled \$2,222,853, resulting in a loss from operations of \$115,884. Unrestricted net assets were \$870,468 at fiscal year end 9/30/07.

Housing Choice Voucher Program

Through the efforts of the Division of Leased Housing, utilization rates are at 100%, resulting in additional administrative revenues and a SEMAP score of 93. Operating receipts totaled \$13,048,819, and operating expenses totaled \$12,222,382, resulting in a

¹ Note that at the time of final Board approval the year was not completed and additional activities may occur between then and September 30th, 2008.

profit from operations of \$826,437. Unrestricted net assets were increased to \$824,988 at fiscal year end 9/30/07.

PHAS

The authority received an overall score of 94 on the PHAS system for the fiscal year ending 9/30/07. The Authority was awarded a perfect 30 out of 30 score in the management indicator and a score of 28 out of 30 on the public housing assessment system's financial indicator for fiscal year ending 9/30/07. In addition, our score on the Physical section was 27 out of 30 and on the Resident section it was 9 out of 10.

SUMMARY

The Lowell Housing Authority remains fiscally stable and ready to adapt to any future fiscal challenges. Further cuts in federal operating subsidies, the implementation of new accounting software and complying with project based accounting are just a few challenges that lie ahead. Time will tell how these challenges will affect the financial integrity of the authority.

Community Service Program

The Lowell Housing Authority's Community Service Policy was adopted by the Board of Commissioners at their regularly scheduled meeting on October 8, 2003. All residents of the Lowell Housing Authority who are impacted by this community service and self-sufficiency requirement have been notified of this new mandate. The Lowell Housing Authority Lease has also been amended to include the Community Service requirement. The 50058 forms have also been updated and will continue to be updated as residents perform their annual re-examinations.

Project Managers are responsible for determining who is or is not performing community service. A special code in the software system indicates those in compliance. Currently, the Lowell Housing Authority, as instructed by HUD, is utilizing Mass Law Reform Institute's Guidelines for Public Housing Community Service Requirements.

Drug Elimination Program

The LHA continued to implement a Drug Elimination Program with funding from the operating budget. These funds provided police dispatch services during first and second shifts for both family and elderly developments. A family support program called "Family Parenting Program" was provided at the North Common Village and George W. Flanagan Developments under an agreement with Casey Family Services, Inc.. This program provides a substance abuse prevention component that has been successful in providing referrals and direct service to residents who have substance abuse problems. Lastly, a youth recreation and activities program has provided direct programming to the youth of the LHA in order to prevent drug abuse in youth. Overall, these programs have

been successful in reaching residents in need and in enhancing the overall security and safety at the Lowell Housing Authority.

ROSS Program

The LHA was awarded a 2005 ROSS grant that allowed it to continue to provide needed programs to elders/disabled adults. This three year ROSS funded program commenced in August 2006. Throughout this past year this program has provided supportive services to elders/disabled adults such as meals on-site, on-site beauty and cosmetology services, on-site store for residents, on-site cafes, music therapy and many other services. Many of the activities have been staffed by resident volunteers who were trained by the Project Coordinator. Other activities have included health screenings, field trips, and educational and informational programs. Many community partnerships have been formed in order to provide a comprehensive array of services to the elderly/disabled adult population. The program is run by a Project Coordinator who is responsible for the success of the activities at each of the elderly sites. The programs get elders/disabled persons to get out and participate in various programs, thus reducing their isolation and improving their overall life experiences.

The program has incorporated the following features:

Population Characteristics

- *Elderly*
- *Disabled (Physically/Mentally Challenged)*

Services to Residents

- *Outpatient Counseling – rapid intakes, home visits*
- *Crisis Intervention – 24hr. availability for resident/staff contact*
- *Ability to complete referrals to DMH/DMR for Case Management*
- *Cross Cultural Enrichment Programs*
- *Mending/Tailoring Program*
- *Intensive Case Management on issues of Hoarding, Mental Health*
- *Disaster Preparedness Program for residents*
- *On-site AA/NA meetings – Community Room*
- *Peer Support Network – Volunteers*
- *Employment assessment, training and support*
- *Preventative Health Education & Services*
- *Tenant Council Liaisons*
- *Money Management*

Family Self-Sufficiency Program

The Lowell Housing Authority's FSS Program takes a holistic approach to self-sufficiency. The Department is made up of a Family Self-Sufficiency/Supportive Services Director, Homebuyer Planner, Youth Activities Director, Transitional Housing Case Manager and a Transitional Housing Family Aide. The mission of the Family Self-Sufficiency Program is to assist residents and Section 8 participants in their quest for self-sufficiency. Some of the programs administered and referred by the Family Self Sufficiency Program include:

- Family Self Sufficiency Section 8 Program
- Section 8 Homeownership Program
- Preparation for Homeownership/First Time Homebuyers Program via MVHP
- Credit Repair
- Resume Development and Interview Preparation
- Employment Referrals
- Free Income Tax Return Preparation
- Voter Registration
- Job Search Assistance
- Computer Training
- Day Care Referrals
- Financial Literacy Program
- Referrals to Middlesex Community College English Learner Institute for ESL Classes
- Referrals to Lowell Adult Education for GED Preparation
- Suitability Referrals
- FSS Coordinating Committee Provider Network
- Middlesex Community College Work Readiness Program
- Promotion of LHA Youth Activities Scholarship
- After-School Program at George Flanagan and North Common Village Developments
- Educational, Recreational and Athletic Programming for LHA Youth
- Cost-Sharing Agreement with Casey Family Services to Provide Driver's Education and Licensing via Safety First Driving School to LHA residents

Currently, the FSS Section 8 Program is comprised of twenty-one participants. During the Spring of 2007, three graduates of the FSS program utilized their escrows to purchase homes. A mass mailing was recently completed to all Section 8 Voucher holders as an effort towards recruitment of new FSS participants. The FSS Program continues to assist in preparing additional Section 8 participants to utilize their vouchers to purchase homes.

Homeownership Program

The FSS Department of the Lowell Housing Authority administers a Homeownership Program. To date, we have 10 Section 8 participants who are utilizing the Section 8 Homeownership Program. The FSS Department is responsible for assisting residents of public housing and Section 8 participants through the home buying process. The staff of the Family Self-Sufficiency Department has many resources and referrals to offer residents interested in pursuing homeownership. Our staff is knowledgeable in obtaining and interpreting credit reports as well as providing guidance with credit repair. Our unique relationship with the Merrimack Valley Housing Partnership, a non-profit in Lowell that educates and certifies residents in the home buying process provided an educational experience that allows our residents to become well-informed homeowners. We also have an exclusive association with the Residents First Development Corporation, a non-profit organization that constructs homes for first-time homebuyers. Section 8 Participants and residents of the Lowell Housing Authority have access to a distinctive networking system that allows them to obtain the skills and knowledge necessary to become successful homeowners. Thus far, the Residents First Development Corporation has completed construction on thirty-four homes (single family, duplex and condex style) at River's Edge on the Concord, the former Julian D. Steele Development. Thirteen additional homes are reserved and pending construction. The Staff of the FSS Department has assisted many of these homeowners from credit repair, shopping for the best interest rate, and obtaining a mortgage. The process of an Affordable Housing Lottery will be initiated in the upcoming weeks.

Low Rent Public Housing Program

Lowell Housing Authority has implemented site-based waiting lists for all of its Federal Public Housing developments. In addition we have established a (0) bedroom (efficiency unit) Waiting List for residents who are seeking this type of unit. The creation of this list will allow us to lease units in less time and reduce the amount of days a unit remains vacant.

The Transfer Policy for Low Rent Public Housing Programs has been revised and implemented. This Policy will now offer four priorities: Emergency, Reasonable Accommodation, Rehabilitation/Demolition and Occupancy Standards (over housed, under housed). It is our hope that this new Policy will effectively meet the needs of residents in all of our developments.

Admissions

Public Housing and Housing Choice Vouchers:

The Division of Public and Leased Housing Programs coordinates continuous screenings of applicants for admission to the Low Rent Public Housing Program and the Section 8 Tenant Based, Project Based and Mainstream Programs. Our staff has been trained in effective screening methods and we have implemented procedures to ensure compliance

with Federal Regulations. Our new computer software allows for more accurate calculations and easier screening procedures.

In November of 2007, the Division of Public and Leased Housing Programs was changed to the Division of Leased Housing Programs. Public Housing staff members were relocated to four Federal Developments in order to accept and screen applicants at the project level. This change has provided applicants with increased access to the Program as these developments are situated in various areas of Lowell. It has also allowed for the separation of the two Programs for Project Based Accounting purposes.

Division of Leased Housing

Section 8 Housing Choice Voucher Program

In 2007, the Division of Public and Leased Housing Programs maintained success in the administration of the Section 8 Housing Choice Voucher Program. Our agency administers a total of 1246 Vouchers through the Section 8 Housing Choice Voucher Program, Section 8 Enhanced Voucher Program, Section 8 Mainstream Program and the Section 8 Project Based Program. Staff members have been trained at length and have a strong knowledge of the specific regulations pertaining to each of these programs.

We are very pleased to have ten homeowners in our Section 8 Program. These individuals have been provided the opportunity to purchase newly constructed two and three bedroom condominiums and single family homes. Each has shown great success in managing their income and making timely mortgage payments. We will work to increase the number of Section 8 homeowners in the coming year.

Finally, the Lowell Housing Authority has been informed by HUD that the overall score for our Section 8 Management Assessment Program for fiscal year ending September 30, 2007 is 93%. The staff members of the Division of Public and Leased Housing Programs have worked very hard to achieve High Performer status and will continue their efforts in 2008.

Facilities Management Programs

Facilities Maintenance

Mass 1-1 North Common Village

1. Beautiful landscaping project completed in the area of Hancock Ave. and Garin Terrace. This included new stamped concrete, new grass, fencing, lighting, public seating area, tree removal and the planting of new trees and shrubs.
2. We received 524 new water saving toilets and new lights and fixtures throughout the development as a result of an energy grant.

3. We are in the process of installing all new package boilers for each building with the energy grant funding.
4. The rehab crew totally gutted one of our three bedroom units at 288 Adams St. # 228 and redesigned it with new stackable washer and dryer, new windows, new shower unit, new ventilation system, new heating system and all new electrical system. This will be the model of all future units.
5. Installation of eight (8) more cameras in the area of Lewis St., O' Brien Terrace and Conlon Terrace. The first three phases of camera installations have resulted in numerous arrests for drug related incidents and crime.
6. Continue to work with the tenant council and the neighborhood businesses/residents to carry on our mission statement for providing safe, decent and affordable housing.

Mass 1-2 George Flanagan

During the past year Maintenance personnel installed 15 new kitchens cabinets.

4 new cameras were installed at George Flanagan for added security.

A Tenant council election will be held in early May 2008

Some front and rear stair railings at George Flanagan were scraped and repainted project will be completed over the summer months.

Plans are being completed by the Facilities department to replace all old and damaged front and rear screen door this year.

Mass 1-3 Bishop Markham Village

New tables and chairs for seven of the Community Rooms.

Reupholstered existing sofas and chairs in eight of the Community Rooms.

Purchased a new dishwasher for the Congregate Housing.

Installed roof drain at 50 Summer Street.

Removed several trees/trimmed remaining trees.

New roofing on small balcony of 198 South Street.

Basements wall work completed at 198, 174 and 130 South St.

Installed carpeting in all vacant apartments.

Added electrical outlets in our large one bedroom units.

Exterior foundation painted.

Repaired/Painted lawn benches.

Various concrete repairs at both Mass 1-3 and 1-4.

Work started on energy conservation.

Changed lights in all common areas.

Installed new toilets in all units.

Installed new shower heads and aerators in both sinks, all units.

Mass 1-4 Lawrence and Faulkner Street

Various concrete repairs completed.

Ma 1-5 Father Norton Manor

Foundations were painted.

Occupied apartments painted.

New energy efficient toilets were installed.

Parking lot surface paved.

MA 1-6 Dewey Archambault Towers

Community room floor was tiled.

Fan replacement in laundry room.

New paved front entrance with new lights.

New energy saving lights in halls and apts.

New energy saving shower heads installed.

Two new elevators were installed and old one removed.

Balconies were reinforced.

Replace main entrance door to administration offices.

Parking arm gate was replaced.

Occupied apartments painted.

Mass 1-7 Harold Hartwell Court

No major renovations occurred at this development.

MA 1-11 Francis Gatehouse

New handicap ramp paved.

Occupied apartments painted.

New energy efficient toilets were installed.

New energy saving lights

Mass 1-12 Scattered Site Housing and Mass 1-14 Scattered Site Housing

Contractor has completed a new wall, stairs and fence at 138 Westford Street. Final set of damaged front stairs will be completed at a latter date.

Capital Improvements

Capital Improvements completed over the last year:

The following is a list of accomplishments for fiscal year ending 9/30/07.

- Repaired walkways, steps, canopies and ramps at MA 1-1, 1-2, 1-3, 1-11 - using forced labor staff.
- Painted occupied units at MA 1-1, 1-3, 1-5, 1-6, 1-11 – using forced labor staff.
- Continued installing security cameras at MA 1-1, 1-5, 1-18 – vendor installation.
- Completed rehab of units at Branch St., Oak St., Griffin St., and Crane St. – rehab crew.
- Completed rehab of 2 elevators at MA 1-6 – Associated Elevator.
- Awarded contract for rehab of elevators at MA 1-11 to Associated Elevator.
- Prepared contract for rehab of elevators at MA 1-5.
- Awarded contract for landscaping at MA 1-1 – Hancock & Garin Areas – Machado & Son.
- Awarded and started ESCO Contract to Ameresco for all developments.

- Resurfaced parking lots and walkways at MA 1-5, 1-6, 1-11, 667-2A.
- Completed repairs to canopies at MA 1-1 using forced labor staff.
- Completed entrance drive-through, lighting & parking at MA 1-6 – Machado & Son and LHA staff.
- Replaced retaining wall, steps and railings at Westford Street – vendor.
- Awarded contract to replace bell tower roof at Archie Kenefick Manor – Five Star Remodeling.
- Started rehab of units at MA 1-1 using forced labor staff.
- Purchased new van for MA 1-2.
- MA 1-18 was completed and turned over to the LHA.
- Started painting the exterior of the Mercier Center using forced labor staff.
- Installed new lighting in cellars at MA 1-3 using LHA staff.

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Administrative Plan for Low Rent Public Housing [ACOP] Amendment

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| LOWELL HOUSING AUTHORITY LOW RENT PUBLIC HOUSING PROGRAM TRANSFER POLICY |
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Amendment to Administrative Plan for Low Rent Public Housing [ACOP] Chapter 9.C and Appendix J

This is a comprehensive Transfer Policy established for public housing units operated by the Lowell Housing Authority. The purpose of this Policy is to ensure that the Authority meets the needs of all residents when there are situations in which a move from one unit to another is required. Within the context of this Policy, the types of transfers to be authorized and the priority granted for each type of transfers will be overviewed.

The Lowell Housing Authority will establish a two tier Transfer Policy. Transfers within the developments under the jurisdiction of a Property Manager will be coordinated at the project level. Transfers from one development to another will be coordinated by the Director of Public Housing Programs. Property Managers will maintain a transfer list for the developments within their jurisdiction while the Director of Public Housing Programs will establish a separate list for transfers out of a development into the jurisdiction of another Property Manager. All transfer assignments will be made in compliance with the Policy as set forth in this document.

OCCUPANCY STANDARDS

The Transfer Policy is based on the Occupancy Standards adopted by the Lowell Housing Authority. These Occupancy Standards provide a guideline for the minimum and maximum number of persons authorized to occupy an apartment. These standards are listed as follows:

| Number of Bedrooms | Number of Persons | |
|--------------------|-------------------|----------------|
| | <u>Minimum</u> | <u>Maximum</u> |
| 0 | 1 | 1 |
| 1 | 1 | 2 |
| 2 | 2 | 4 |
| 3 | 3 | 6 |
| 4 | 4 | 8 |
| 5 | 5 | 10 |
| 6 | 6 | 12 |

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TYPES OF TRANSFERS

The Lowell Housing authority will consider the following types of transfers in an effort to meet the needs of residents. Some transfers will be mandatory while others are optional. The following is an overview of the criteria that the Authority will utilize in the determination of the need for a transfer:

- 1 EMERGENCY:** An Emergency Transfer will be granted if conditions exist in a unit, building or site, that pose an immediate threat to the health or safety of a resident or family members. Additionally, an emergency transfer may be granted when a resident is at risk of harm due to criminal elements at the property or in the neighborhood, or in the case of domestic violence. In these situations, transfer requests must be supported by an assessment from a law enforcement official and verified in writing. Emergency transfers will also be granted in order to alleviate a verified medical condition of a life-threatening nature. This includes requests for transfers based on the assessment of a rehabilitation center or nursing home, that a resident cannot leave a facility until a transfer is made available.
- 2 REASONABLE ACCOMMODATION:** Transfers will be authorized when a resident needs to move to a different apartment as an accommodation to the resident's disability. This includes but is not limited to the need for a resident to occupy a ground floor unit because his/her disability prevents him/her from climbing stairs or a resident who requires a unit with certain physical features that cannot be provided in the current unit. The complete Reasonable Accommodation Policy of the Lowell Housing Authority can be found in the Administrative Plan for the Low Rent Public Housing Program.
- 3 DEMOLITION, DISPOSITION, REVITALIZATION OR REHABILITATION:** Transfers coordinated for this purpose allow the Housing Authority to demolish, sell or complete major rehabilitation work at a building or at a development. These transfers will be done as part of an approved demolition/disposition or rehabilitation plan.
- 4 OCCUPANCY STANDARDS (Over Housed and Under Housed):** These required transfers are made when a resident's family size has changed and the unit is too large or too small based on the Authority's Occupancy Standards.

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The Lowell Housing Authority will only authorize transfers based on the above criteria. The Authority will not authorize resident initiated transfers that do not comply with these guidelines.

TRANSFER PRIORITIES

Transfers will be offered based on the following priorities:

1. Emergency
2. Reasonable Accommodation
3. Demolition, Disposition, Rehabilitation
4. Occupancy Standards (Under Housed and Over Housed)

For each bedroom size, one of every two vacancies shall be assigned to a family from a Transfer List. In order to ensure that the priorities are being met in this process, the Property Manager will work with the Director of Public Housing Programs in determining the assignment of a transfer. Vacancies will be filled with residents who hold the highest priority.

The Property Manager will consult with the Director of Public Housing Programs to determine the resident with the highest priority and highest number (based on date and time of the transfer request) on each of the Transfer Lists. The resident holding the highest rating will be offered the transfer.

MANDATORY TRANSFERS

Transfers will be considered mandatory if they are listed under the following priorities:

Emergency
Demolition/disposition/revitalization/rehabilitation
Occupancy Standards (Under Housed and Over Housed)

Transfers offered to meet a Reasonable Accommodation request shall not be mandatory. In the case of an under housed situation, when a family is occupying a unit that is too small based on the family size and is in violation of city code requirements, the transfer will be considered mandatory. In the case of an over housed situation, the transfer will be considered mandatory. Residents have the opportunity to dispute a Mandatory Transfer utilizing the Lowell Housing Authority's grievance procedure as found in the Administrative Plan for the Low Rent Public Housing Program

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Administrative Plan for Low Rent Public Housing [ACOP] Amendment

ELIGIBILITY REQUIREMENTS FOR TRANSFERS

The Lowell Housing Authority will require that residents meet certain requirements if they are seeking a transfer. The Authority shall not impose these requirements in an emergency situation. These requirements may also be waived at the discretion of the Property Manager or Director of Public Housing Programs. The Authority will impose the following requirements of the resident making the transfer request:

- The Family must not engage in criminal activity that threatens the health and safety of other residents.
- The family cannot owe back rent, damage charges or have a history of late rental payment. Also, the family may not be in arrears on any established repayment agreement. If the family is in arrears, the full balance must be paid prior to approval of the transfer. If repayment agreements are being paid in a timely manner, transfer requests shall be authorized.

Transfer request forms will be available at the office of the Public Housing Manager and the office of the Director of Public Housing Programs. All transfer request forms will first be reviewed by the Property Manager to determine if the transfer request is valid and in compliance with Transfer Policy criteria. If the transfer may be coordinated within the jurisdiction of the Property Manager, the resident will be placed on the Property Manager's transfer list. If there is a need to transfer out of the jurisdiction, the Transfer form will be forwarded to the Director of Public Housing Programs for placement on the Director's Transfer list.

TRANSFER ASSIGNMENTS

Residents will be offered one transfer assignment. If the offer is refused by the resident, the Property Manager/Director of Public Housing Programs shall remove the family from the Transfer List. The unit will then be offered to the next resident on a transfer list. A transfer offer not accepted within one day of notification of such offer will be considered to have been refused. In the case of a Mandatory Transfer, refusal of a transfer assignment may result in legal action to terminate the lease of the resident. If medical or other documentation is presented which, in the opinion of the Executive Director, indicates that good cause exists for a residents' refusal of a transfer assignment, another transfer assignment will be granted.

In under housed/over housed situations, transfers will be made within a development in accordance with occupancy guidelines. Transfer offers to other developments may be necessary when a family requires a unit size that does not exist in the development in which they reside. In the coordination of a transfer the Property Housing Manager and the Director of Public Housing Programs may consider special requests made by the

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family to situate in another development. Within each priority group, the elderly may limit a transfer request to only an elderly development.

COSTS ASSOCIATED WITH TRANSFERS

The Lowell Housing Authority will assume reasonable costs associated with transfers initiated for purposes of demolition, disposition, revitalization and rehabilitation. In addition, costs associated with transfers coordinated due to building system failures and other emergency conditions that cannot be corrected within 24 hours will be paid by the Authority. In all other instances, the resident will assume the cost of the transfer.

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LOWELL HOUSING AUTHORITY

Code of Ethics

For the
Low-Income Public Housing Administrative Plan

The Lowell Housing Authority establishes this Code of Ethics covering all Board Members, officials, agents, employees and professional consultants employed by the Lowell Housing Authority. These individuals are subject to the standards put forth in this document.

The Lowell Housing Authority prohibits improper conduct by any official or employee. A Lowell Housing Authority board member or employee cannot have a financial interest in contracts with the Lowell Housing Authority. A board member or employee may not accept gifts to influence a decision and cannot accept compensation, other than that paid by the Lowell Housing Authority, in connection with any matter that the agency has an interest.

The Lowell Housing Authority shall not contract with or purchase goods or services from a board member, employee or other member of the immediate family of such board member or employee. Additionally, no rental assistance shall be paid for any unit owned in whole or in part by a board member, official, or any employee of the agency or any member of any such person's immediate family without the prior written consent of the State Ethics Commission, the Department of Housing and Urban Development and the Department of Housing and Community Development.

No member of the Board of Commissioners, official, agent, or employee or any member of his or her immediate family shall request, solicit, receive, or accept any cash, gift or compensation in any amount from any Lowell Housing Authority resident or any person who does business with the Authority. Members of the Board of Commissioners may, through the normal scope of business, provide professional services, which have no connection with the Lowell Housing Authority, to residents who retain such services. No employee may accept compensation for goods or services provided to a resident.

No employee of the Lowell Housing Authority, involved in the solicitation of bids and proposals and the award and administration of procurements of any sort, nor any member of his/her immediate family, during his/her tenure or one year thereafter, shall directly or indirectly, have any financial or other interest in the firm selected for award of, or any property to be included in, or any contract for property, materials, or services to be furnished or used in connection with, any

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contract or procurement, or the proceeds thereof, for which that employee has or will be involved in the solicitation of bids, proposals, award or administration.

Employees found to be in violation of the standards outlined above will face disciplinary action, as determined by the Executive Director.

The information contained in this Code of Ethics will be reviewed with each new employee at time of hire and sent to all employees on an annual basis. New members of the Board of Commissioners will be provided this document prior to the inception of their term.

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LOWELL HOUSING AUTHORITY

Code of Ethics

For the
Housing Choice Voucher Program Administrative Plan

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